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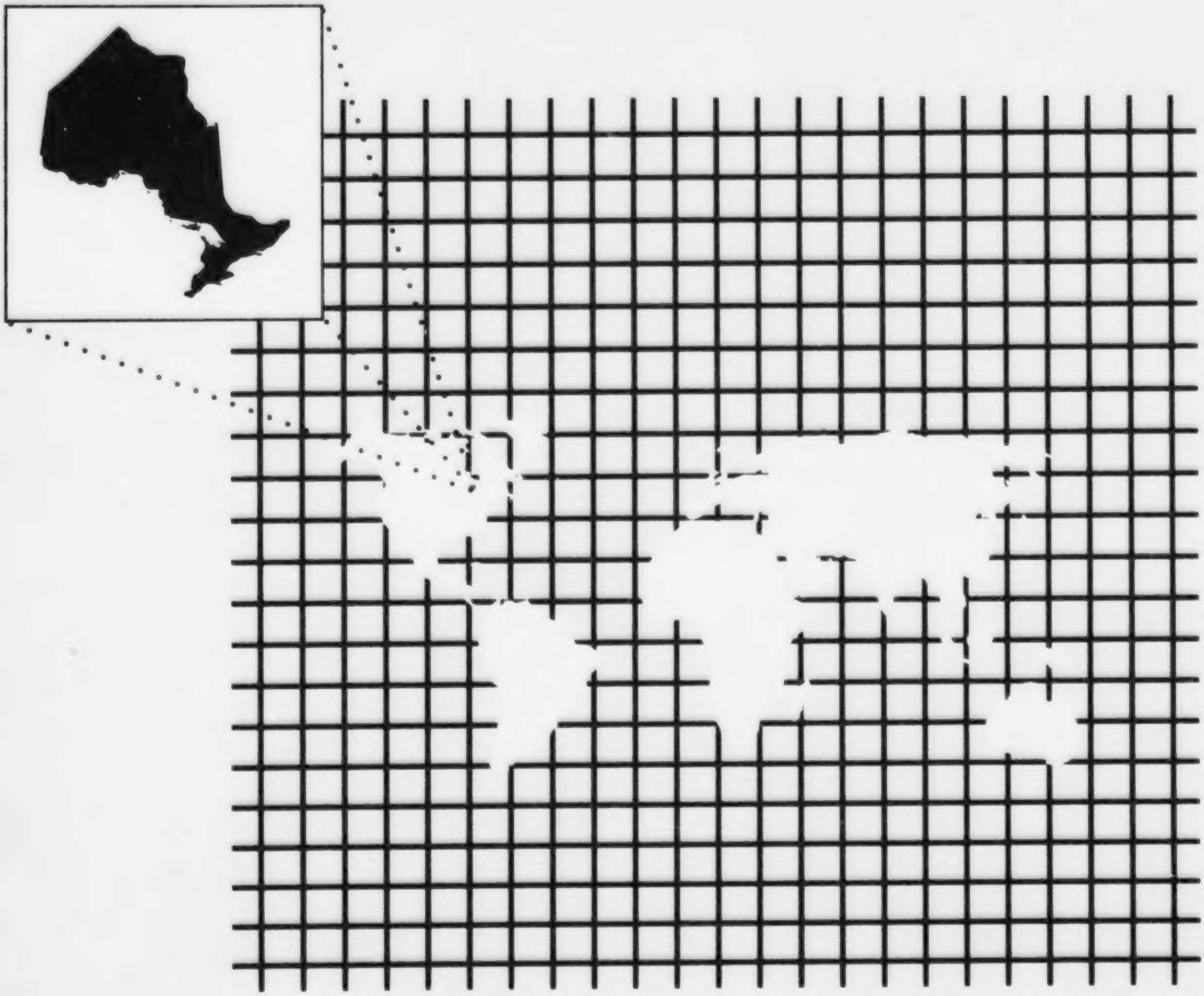

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THE OVERNIGHT TRAVEL REGIONS & INTERNATIONAL GATEWAYS OF ONTARIO - 1996

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INTRODUCTION

The purpose of this report is to examine Ontario's international gateways and overnight travel regions; two issues that have been much discussed over the last 15 years in the ministry's strategic plans for tourism. The data contained in it were extracted by Statistics Canada and Research Resolutions from the Canadian Travel Survey and the International Travel Survey on behalf of MEDTT. Both surveys are being conducted by Statistics Canada annually.

The analysis in this report is being restricted to overnight visits and overnight excursions only because data on same day excursions while on an overnight trip are not available.

The following definitions are used for the geographic regions indicated in the appendices (CA=census agglomeration, CMA= census metropolitan area, CD= census division, C=County, RM=Regional municipality, D=District, DM=District Municipality, MM=Metropolitan Municipality):

Census Divisions	
Algoma D	CD57
Brant C	CD29
Bruce C	CD41
Cochrane D	CD56
Dufferin C	CD22
Durham RM	CD18
Elgin C	CD34
Essex C	CD37
Frontenac C	CD10
Grey C	CD42
Haldimand-Norfolk RM	CD28
Haliburton C	CD46
Halton RM	CD24
Hamilton-Wentworth RM	CD25
Hastings C	CD12
Huron C	CD40
Kenora D	CD60
Kent C	CD36
Lambton C	CD38
Lanark C	CD09
Leeds & Grenville C	CD07
Lennox & Addington C	CD11
Manitoulin D	CD51
Middlesex C	CD39
Niagara RM	CD26
Nipissing D	CD48
Northumberland C	CD14
Ottawa-Carlton RM	CD06
Oxford C	CD32
Parry Sound D	CD49
Peel RM	CD21
Perth C	CD31
Peterborough C	CD15
Prescott & Russell C	CD02
Prince Edward C	CD13

Census Divisions	
Rainy River D	CD59
Renfrew C	CD47
Simcoe C	CD43
Stormont, Dundas & Glengarry	CD01
Sudbury D	CD52
Sudbury RM	CD53
Thunder Bay D	CD58
Timiskaming D	CD54
Toronto MM	CD20
Victoria C	CD16
Waterloo RM	CD30
Wellington C	CD23
York RM	CD19

Census Sub-Division
Algonguin Park
CSD 48-091

Census Agglomerations	
Pembroke	CA515
Barrie	CA568
Cornwall	CA501
Brockville	CA512
Kingston	CA521
Belleville	CA522
Cobourg	CA527
Brantford	CA543
Peterborough	CA529
Lindsay	CA530
Guelph	CA550
Orillia	CA569
Midland	CA571
Owen Sound	CA566
Collingwood	CA567
Stratford	CA553
Sarnia-Clearwater	CA562
Elliot Lake	CA582
Haileybury	CA584
Kirkland Lake	CA585
Timmins	CA586
Sault Ste. Marie	CA590
Kenora	CA598

Metropolitan Areas	
Hamilton	CMA537
Oshawa	CMA532
St. Catharines-Niagara	CMA539
Kitchener-Waterloo	CMA541
London	CMA555
Windsor	CMA559
North Bay	CMA575
Sudbury	CMA580
Thunder Bay	CMA595

Section A of this report examines the travel size of each of Ontario's regions, as measured by number of overnight visitors received by each region from a specific market. We have dis-aggregated Ontario's travel market into seven segments (Ontarians, Quebeckers, Manitobans, residents of Atlantic Canada, residents of western Canada, Americans and residents of overseas countries) because each of these markets has a different spatial pattern. This section sets the stage for the subsequent analysis of Ontario's travel regions.

Section B defines an international gateway and then examines which of Ontario's international ports and points of entry meet the definition. Sections C and D examine Ontario's regions to determine whether or not some of them could be put together to form a travel regions for each of the seven market segments. Section C examines the total overnight market, while Section D examines the overnight pleasure market.

EXECUTIVE SUMMARY

OVERVIEW

- Toronto, Niagara and Ottawa-Carleton dominate the overnight as well as the overnight pleasure market of Ontario.

- Toronto's dominance in the overnight pleasure market is diminished when compared to the overall overnight market, primarily because a large portion of the region's overnight market consists of business travel.

- Apart from Toronto, Niagara and Ottawa-Carleton, there are other Ontario regions that dominate specific sub-markets. For example, Simcoe and Muskoka are the top regions visited by Ontario residents on overnight pleasure trips, while Kenora dominates the Manitoba market.

- For any given Ontario county/district, the supply of its visitors from Ontario comes from the region itself and its nearby neighbours.

- Given the visitation levels by the various markets the following conclusions can be reached as far as the trip experiences that each market seeks: The US market is focussed primarily on a city experience, the overseas market is more diversified focussing on city as well as on touring experiences, the Ontario residents' and the Manitoba market is focussed primarily on outdoor experiences, while the western Canada and the Atlantic Canada markets are focussed primarily on a city experience.

- Although Toronto, Niagara, Windsor and Sarnia are significant ports of entry for the overnight US market, none of them is a gateway for this market. However, Niagara is a gateway for the overnight pleasure visitors from the US, while Toronto is not even a significant port of entry for these visitors.

- No overall relationship between gateways and non-gateways and the length of stay in Ontario exists. However, for any given Ontario port, there is a positive relationship between the US visitors' length of stay in Ontario and the number of regions visited. The challenge for Ontario's tourism therefore will be to convince the Americans to buy more touring trips in Ontario, thereby increasing their length of stay and expenditures.

- Toronto, Niagara and Prescott/Stormont are significant points of entry into Ontario for the overnight overseas visitors. However, only Toronto and Niagara are also gateways.

- With the exception of French visitors, the majority of all other overseas origins comes to the province through Ontario ports of entry. There seem to be opportunities for joined marketing efforts with the US as far as the Asian visitors to Ontario are concerned and with Quebec as far the French visitors to Ontario are concerned.

- No overall relationship between gateways and non-gateways and the length of stay in Ontario exists for this market as well. However, for any given Ontario port, there is a positive relationship between the overseas visitors' length of stay in Ontario and the number of regions visited. However this relationship was not present in the overnight pleasure market.

- There seem to be some missed opportunities to increase Ontario's overnight visitors from overseas and the US who come to Canada through the Toronto and the Leeds & Grenville ports, but do not visit any Ontario regions. It appears that by providing these visitors with the appropriate stimulus and information at those ports of entry, some of this traffic (especially those who enter through Leeds & Grenville by car) could be made to visit Ontario either during their present trip or at some later date.

- As far as the Ontario residents' market is concerned, every Ontario region is a travel region on its own right.

- As far as the Quebec market is concerned, Toronto and Ottawa could form a weak virtual travel region.

- For the Manitoba market, Kenora is a travel region on its own right, while for the Atlantic and western Canada markets, Toronto, Ottawa and Niagara could form a virtual travel region.

- US overnight visitors to Ontario move around the province more than the domestic visitors do and as such there are more opportunities for the formation of travel regions in this market than there are in the domestic market. These travel regions could be form along the corridors:

    - Windsor-Toronto
    - Sarnia-Toronto
    - Niagara-Toronto
    - Leeds & Grenville-Toronto
    - Leeds & Grenville-Ottawa, and to a lesser extent
    - Leeds & Grenville-Northern Ontario

- Overseas overnight visitors to Ontario move around the province more than the domestic visitors and the US visitors do and as such there are more opportunities for the formation of travel regions in this market. It appears that the circular corridor of:

    Niagara-Toronto-Frontenac-Leeds & Grenville-Ottawa-Algonquin Park- Muskoka-Simcoe-Toronto

    could form a travel region for the overseas market. At the present time, the interaction among the regions that form the southern portion of this circular corridor is much stronger than the interaction among the regions that form its northern portion.

- Some opportunities for extending the overseas visitors length of stay, and as such their expenditures, could exist within the above-noted circular corridor, as well in the presently unexplored regions (among overseas visitors) of northern Ontario and southwestern Ontario.

SECTION A: Regional Rankings - Total Overnight

- The **US** market is dominated by: **Toronto & Niagara**
- The **overseas** market by: **Toronto, Niagara & Ottawa**
- The **Manitoba** market by: **Kenora**
- The **Quebec** market by: **Toronto & Ottawa**
- The **Western Canada** market by: **Toronto & Ottawa**
- The **Atlantic Canada** market by: **Toronto & Ottawa**
- The Ontario residents' market was much more widely spread across the province in the sense that it took, in 1996, over 10 regions to account for 50% of the these visitors.
- The widespread distribution of the Ontario residents' market over the province is due to the fact that on average, Ontario residents tend to cross 1.4 counties (3.3 for southern regions) plus their own to get to their Ontario destinations. As such, the majority of the supply of Ontario visitors to each of Ontario's regions came, in 1996, from the county itself and its immediate neighbours.
- The US and overseas markets (as well as the Atlantic, western Canada and Quebec markets) have more of an urban and touring orientation, while the Ontario resident market has more of a rural orientation. This is also supported by data on the kind of activities that visitors engage in.

SECTION A: Regional Rankings - Overnight *Pleasure*

- The **US** pleasure market is dominated by: **Toronto & Niagara**
- The **overseas** pleasure market is dominated by: **Toronto, Niagara & Ottawa**
- The **Ontario residents'** pleasure market is much more widely distributed across the province than any other market, dominated by eight regions
- The Quebec, Manitoba, western Canada & Atlantic Canada pleasure markets were dominated by the same regions that dominated the total overnight visitors from these markets.
- Although Metro Toronto was the top region visited in the overnight pleasure market, its importance was not as significant as it was in the total overnight market. This is primarily due to the fact that a large portion of Toronto's overnight market is business travel. In 1996, Toronto accounted for 45.8% of all overnight business visits to Ontario.
- Overnight pleasure travellers from Ontario crossed on average 1.3 counties plus their own to reach their Ontario destinations and 3.1 counties plus their own to reach their destinations in southern Ontario. As such, these travellers travelled even shorter distances than other overnight travellers from Ontario.

SECTION B: International Gateways - The Overnight US Market

- 6.8 million Americans on an overnight trip entered Canada through Ontario ports in 1996.
  - 3.4%, or 235,00 did not visit any Ontario regions. Almost half of these Americans entered Canada through Toronto airport
  - An additional 186,000 Americans who spent one or more nights in Ontario entered Canada through non-Ontario ports

Name Of Port	*Significant Port?*	*Significant Visits To Other Ontario Regions?*	*Significant Destination?*	*Gateway?*
Niagara	**Yes** (31.2% of Ontario's overnight US visitors)	**Yes** (63.0% visited other regions)	**No** (46.6% visited Niagara region)	**No**
Toronto	**Yes** (18.4% of Ontario's overnight US visitors)	**No** (only 43.7% visited other regions)	**Yes** (59.4% visited Toronto and 64.6% visited Toronto-Peel)	**No**
Windsor	**Yes** (15.1% of Ontario's overnight US visitors)	**Yes** (72.4% visited other regions)	**No** (30.3% visited the Essex)	**No**
Sarnia	**Yes** (11.8% of Ontario's overnight US visitors)	**Yes** (89.3% visited other regions)	**No** (13.2% visited Lambton)	**No**
Leeds & Grenville	**Regionally** (9.0% of Ontario's overnight US visitors, but 49.7% for eastern Ontario)	**Yes** (79.7% visited other regions)	**No** (25.2% visited the region)	**No**
Sault Ste. Marie	**Regionally** (33.2% of the North's overnight US visitors)	**Yes** (52.0% visited other regions)	**Yes** (57.0% visited Algoma)	**Regional**
Rainy River	**Regionally** (35.2% of the north's overnight US visitors)	**Yes** (85.6% visited other regions)	**No** (18.2% visited the region)	**No**

- OTAP 2 is not a significant destination region for the overnight US visitors who entered Ontario through the Niagara ports.

- OTAP 1 is not a significant destination region for the overnight US visitors who entered Ontario through Windsor or Sarnia.

- The region stretching from Lennox & Addington, to Lanark, to the Quebec border is a significant destination region for the overnight US visitors who entered Ontario through Leeds & Grenville.

- Toronto is an important destination region for the overnight US visitors who entered Ontario through Niagara, Windsor and Sarnia. However, the reverse is not true. For example, 34.0% of the overnight US visitors who entered Niagara, visited Toronto, while only 3.7% of those who entered Ontario through Toronto visited Niagara.

- The southern ports of Niagara (especially Niagara), Toronto, Windsor, Sarnia and Leeds & Grenville accounted for 21.9% of the overnight US visitors to Northern Ontario.

- No overall relationship between gateways and non-gateways and the length of stay in Ontario. However, for any given Ontario port, there is a positive relationship between the US visitors' length of stay in Ontario and the number of regions visited.

Total Overnight - US	Port Of Entry Into Ontario			
	Toronto	Niagara Falls	Windsor	Sarnia
Number of Regions Visited	Average Length Of Stay In Ontario			
Only the region of the port of entry	2.84 nights	2.03 nights	1.64 nights	2.55 nights
One Ontario region- other than the port	3.24 nights	2.65 nights	3.17 nights	2.32 nights
Two Ontario regions	5.69 nights	3.84 nights	5.76 nights	4.74 nights
Three Ontario regions	7.53 nights	6.77 nights	7.84 nights	5.63 nights
Four or more Ontario regions	9.35 nights	5.26 nights	7.61 nights	7.17 nights

SECTION B: International Gateways - The Overnight Overseas Market

- The overnight overseas visitors who entered Canada through Ontario's ports and visited Ontario accounted for 76.7% of the overnight visitors to Ontario from overseas countries.

- Of the remaining (23.3%) overnight overseas visitors who visited Ontario, 16.0% entered Canada through Quebec, 5.9% through BC and 1.4% through other provinces.

- 5.8%, or 104,000, of the overnight overseas visitors who entered Canada through Ontario ports did not visit any provincial region.

- For the overnight overseas visitors who entered Canada through Ontario, there were only two provincially significant ports, Toronto and Niagara accounting for 87.3% of these visitors.

- The overseas visitors who entered Canada through Toronto and Niagara Falls and visited Ontario accounted for 66.5% of the province's total overnight overseas visitors.

- For the overnight overseas visitors who visited Ontario but entered Canada through another province, the region formed by Prescott & Russell and Stormont, Dundas & Glengarry was a major gateway to Ontario, followed by Toronto.

	Significant Port?	*Significant Visits To Other Ontario Regions?*	*Significant Destination?*	*Gateway?*
Overnight Overseas Visitors Entering Canada Through Ontario Ports				
Toronto	Yes (processed 73.9% of these visitors)	Yes (65.2% visited other Ontario regions)	Yes (57.2% visited Toronto)	Yes
Niagara Falls	Yes (processed 13.4% of these visitors)	Yes (50.8% visited other Ontario regions)	Yes (68.1% visited the Niagara region)	Yes
Overnight Overseas Visitors Entering Canada Through A Non-Ontario Port				
Prescott/ Stormont	Yes (processed 61.7% of these visitors)	Yes (at least 96.1% visited other Ontario regions)	No (3.9% visited the region)	No
Toronto	Yes (processed 29.3% of these visitors)	No (only 44.0% visited other Ontario regions)	Yes (100.0% visited Toronto)	No
All Overnight Overseas Visitors				
Toronto	Yes (processed 62.6% of Ontario's overnight overseas visitors)	Yes (63.0% visited other Ontario regions)	Yes (61.5% visited Toronto)	Yes
Niagara Falls	Yes (processed 10.7% of Ontario's overnight overseas visitors)	Yes (50.8% visited other Ontario regions)	Yes (68.1% visited the Niagara region)	Yes
Prescott/ Stormont	Yes (processed 14.4% of Ontario's overnight overseas visitors)	Yes (at least 96.1% visited other Ontario regions)	No (3.9% visited the region)	No

- The overnight overseas visitors who entered Canada through the Toronto ports accounted for 60.4% of the total overnight overseas visitors to Northern Ontario.

- The majority of the overseas visitors (62.5% overall) who entered Canada through Ontario's ports visited only one region in 1996. On average these visitors visited 1.48 Ontario counties, while those who had a visit in the province visited on average 1.58 counties. In contrast, the overnight US visitors who entered Canada through the Ontario ports visited on average 1.13 counties, while those with a visit in the province visited on average 1.17 counties.

	Total Overnight Visits In Ontario	Port of Entry Into Canada, 199					
Origin Of Visitors		**Toronto**	**Niagara Falls**	**Quebec**	**BC**	**Other Ontario**	**Other Canada**
UK	380,000 (100.0%)	291,000 (76.6%)	9,000 (2.4%)	40,000 (10.5%)	4,000 (1.1%)	30,000 (7.9%)	6,000 (1.6%)
France	184,000 (100.0%)	56,000 (30.4%)	5,000 (2.7%)	117,000 (63.6%)	1,000 (0.5%)	5,000 (2.7%)	0 (0.0%)
Germany	209,000 (100.0%)	150,000 (71.8%)	7,000 (3.3%)	27,000 (12.9%)	2,000 (1.0%)	18,000 (8.6%)	5,000 (2.4%)
Other Europe	364,000 (100.0%)	219,000 (60.2%)	19,000 (5.2%)	78,000 (21.4%)	4,000 (1.1%)	31,000 (8.5%)	13,000 (3.6%)
Japan	277,000 (100.0%)	100,000 (36.1%)	78,000 (28.2%)	8,000 (2.9%)	39,000 (14.1%)	50,000 (18.1%)	2,000 (0.7%)
Other East Asia	343,000 (100.0%)	153,000 (44.6%)	64,000 (18.7%)	7,000 (2.0%)	63,000 (18.4%)	55,000 (16.0%)	1,000 (0.3%)
Caribbean	72,000 (100.0%)	59,000 (81.9%)	3,000 (4.2%)	2,000 (2.8%)	0 (0.0%)	7,000 (9.7%)	1,000 (1.4%)
Oceania	84,000 (100.0%)	50,000 (59.5%)	3,000 (3.6%)	12,000 (14.3%)	11,000 (13.1%)	6,000 (7.1%)	2,000 (2.4%)
Central & South America	125,000 (100.0%)	74,000 (59.2%)	8,000 (6.4%)	30,000 (24.0%)	0 (0.0%)	12,000 (9.6%)	1,000 (0.8%)

- Of the overnight overseas visitors who visited Ontario but entered Canada through a non-Ontario port, 44.9% visited one county, 30.6% visited two counties and 24.5% visited three or more counties. The average number of counties visited was 2.0.

- Of the overseas visitors who entered Canada through Niagara Falls, Niagara and Toronto were the two regions with significant visitation levels

- Of the overseas visitors who entered Canada through Toronto, Niagara, Toronto and Ottawa were the regions with significant visitation levels.

- Overall, the existing Ontario travel regions do not seem to be relevant as far as the overnight overseas visitors are concerned. The non-neighbouring regions of Toronto, Niagara and Ottawa appear to form a virtual travel region for these visitors.

- There does not seem to be a relationship between gateways/non-gateways and the average length of stay a visitor stays in Ontario. However, there is a strong relationship between the number of regions a visitor who goes through a specific port of entry visits and the average length of stay in Ontario.

Total Overnight - Overseas	Port Of Entry Into Ontario		
	All Ontario Ports	Toronto	Niagara Falls
Number of Regions Visited	Average Length Of Stay In Ontario		
Only the region of the port of entry	4.00 nights	9.83 nights	2.22 nights
One Ontario region- other than the port	8.44 nights	9.38 nights	3.33 nights
Two Ontario regions	9.40 nights	10.85 nights	4.68 nights
Three Ontario regions	13.19 nights	14.04 nights	7.46 nights
Four or more Ontario regions	16.57 nights	16.86 nights	-

SECTION B: International Gateways - The Overnight US Pleasure Market

- A total of 3.9 million Americans entered Canada through Ontario ports while on an overnight pleasure trip
    - Of these, 3.0% or 117,000 did not visit any Ontario regions
    - Toronto accounted for half and Leeds & Grenville for the other half of these 117,000 Americans

- The overnight pleasure visitors from the US who entered Canada through Ontario's ports and visited the province accounted for 97.4% of Ontario's overnight pleasure visitors from the US.

- Toronto processed only 5.3% of the US overnight pleasure visitors, losing its second place among the overall overnight US visitors. The reason for Toronto's decline is that the majority of the overnight US visitors who entered Canada through its ports (61.0%) were on a business trip.

- The overnight pleasure visitors from the US who entered Canada through the Niagara Falls' ports played a significant role for the Niagara region's total overnight pleasure visitors from the US (77.9%), as well as Toronto's (49.3%).

- Windsor and Sarnia also played an important role for Toronto's total overnight pleasure visitors from the US (accounting for 19.4% and 12.7%, respectively, of Toronto total US overnight pleasure visitors).

- The ports of Rainy River and SS Marie accounted in 1996 for 60.8% of northern Ontario's total overnight pleasure visitors from the US.

- The majority of the US overnight visitors (82.3% overall) who entered Canada through Ontario's ports while on a pleasure trip, visited only one county in 1996.

- On average US pleasure visitors visited 1.16 Ontario counties, while those who had a visit in the province visited on average 1.20 counties. These averages are slightly higher than the overall overnight US visitors who entered Canada through the Ontario ports (1.13 counties for all entrants and 1.17 for those with a visit in the province).

	OVERNIGHT PLEASURE VISITORS FROM THE US, 1996			
Name of Port	***Significant Port?***	***Significant Visits to Other Ontario Regions?***	***Significant Destination?***	***Gateway?***
Niagara Falls	**Yes** (39.8% of Ontario's overnight pleasure visitors from the US)	**Yes** (57.2% visited other Ontario regions)	**Yes** (52.5% visited the Niagara region)	**Yes**
Windsor	**Yes** (13.9% of Ontario's overnight pleasure visitors from the US)	**Yes** (81.5% visited other Ontario regions)	**No** (22.0% visited Essex)	**No**
Sarnia	**Yes** (12.6% of Ontario's overnight pleasure visitors from the US)	**Yes** (90.0% visited other Ontario regions)	**No** (13.0% visited Lambton)	**No**
Leeds & Grenville	**Yes** (10.9% of Ontario's overnight pleasure visitors from the US)	**Yes** (77.1% visited other Ontario regions)	**No** (29.1% visited the L&G)	**No**
Rainy River	**Regionally** (37.5% of the North's overnight pleasure visitors from the US, 7.1% of Ontario's)	**Yes** (86.3% visited other Ontario regions)	**No** (17.3% visited the Rainy River)	**No**
SS Marie	**Regionally** (36.7% of the North's overnight pleasure visitors from the US, 7.0% of Ontario's)	**Yes** (52.0% visited other Ontario regions)	**Yes** (58.3% visited Algoma)	**Yes; Regional**

- OTAP 1 is not a destination region for the overnight pleasure visitors from the US who entered Canada through the Windsor ports (received 30.8% of visits with known destination).

- OTAP 1 is also not a destination region for the overnight pleasure visitors from the US who entered Canada through the Sarnia ports (received 40.2% of visits with known destination).

- OTAP 6 is a destination region for the overnight US pleasure visitors who entered Canada through the Leeds & Grenville ports (the area from Lennox & Addington to Prescott & Russel in the east and Lanark in the north received 68.6% of the known visits).

- Kenora, Thunder Bay and Rainy River constitute a destination region for the overnight pleasure visitors from the US who entered Canada through the Rainy River ports (received 91.7% of the visits with known destination).

- Algoma, Sudbury district, Sudbury RM and Manitoulin constitute a destination region fro the US overnight pleasure visitors who entered Canada through the SS Marie port (60.1% of know visits).

- There does not appear to be a relationship between gateways/non-gateways and the overnight US pleasure visitors' average length of stay in Ontario. However, there is a strong relationship between the number of regions visited and the average length of stay of those visitors who enter Canada through a specific port.

Overnight Pleasure-US	Port Of Entry Into Ontario		
	All Ontario Ports	Niagara Falls	S.S. Marie
Number of Regions Visited	Average Length Of Stay In Ontario		
Only the region of the port of entry	2.64 nights	2.04 nights	3.47 nights
One Ontario region- other than the port	3.20 nights	2.57 nights	2.87 nights
Two Ontario regions	4.49 nights	3.96 nights	3.26 nights
Three or more Ontario regions	6.61 nights	6.60 nights	7.38 nights

SECTION B: International Gateways - The Overnight Pleasure Market From Overseas

- The overnight pleasure visitors from overseas countries who entered Canada through Ontario's ports and visited the province accounted for 69.9% of Ontario's total from this market.

- Of the remaining overnight pleasure visitors from overseas (30.1%) who visited Ontario, 21.9% entered Canada through Quebec, 6.4% through BC, and 1.9% through other Canadian provinces.

	Total Overnight Pleasure Visits In Ontario	**Port of Entry Into Canada, 1996**					
Origin Of Visitors		**Toronto**	**Niagara Falls**	**Quebec**	**BC**	**Other Ontario**	**Other Canada**
UK	174,000 (100.0%)	120,000 (69.0%)	4,000 (2.3%)	32,000 (18.4%)	3,000 (1.7%)	13,000 (7.5%)	2,000 (1.1%)
France	133,000 (100.0%)	35,000 (26.3%)	4,000 (3.0%)	91,000 (68.4%)	1,000 (0.8%)	2,000 (1.5%)	0 (0.0%)
Germany	122,000 (100.0%)	79,000 (64.8%)	7,000 (5.7%)	20,000 (16.4%)	2,000 (1.6%)	10,000 (8.2%)	4,000 (3.3%)
Other Europe	162,000 (100.0%)	77,000 (47.5%)	10,000 (6.2%)	44,000 (27.2%)	3,000 (1.9%)	18,000 (11.1%)	10,000 (6.2%)
Japan	176,000 (100.0%)	36,000 (20.5%)	65,000 (36.9%)	6,000 (3.4%)	26,000 (14.8%)	42,000 (23.9%)	1,000 (0.6%)
Other Asia	213,000 (100.0%)	59,000 (27.7%)	80,000 (37.6%)	13,000 (6.1%)	29,000 (13.6%)	31,000 (14.6%)	1,000 (0.5%)
All Other	135,000 (100.0%)	68,000 (50.4%)	13,000 (9.6%)	36,000 (26.7%)	6,000 (4.4%)	9,000 (6.7%)	3,000 (2.2%)

- 5.1% or 42,000 of the overnight pleasure visitors from overseas who entered Canada through Ontario ports did not visit any Ontario region. Almost all of these visitors entered Canada through Toronto.

	OVERNIGHT PLEASURE VISITORS FROM OVERSEAS, 1996			
Name of Entry Point	***Significant Port?***	***Significant Visits to other Ontario Regions?***	***Significant Destination?***	***Gateway?***
Overnight Pleasure Visitors From Overseas Entering Canada Through Ontario Ports				
Toronto	**Yes** (processed 42.7% of Ontario's overnight pleasure visitors from overseas)	**Yes** (67.6% visited other Ontario regions)	**Yes** (66.8% visited Toronto)	**Yes**
Niagara Falls	**Yes** (processed 16.5% of Ontario's overnight pleasure visitors from overseas)	**No** (only 46.2% visited other Ontario regions)	**Yes** (72.6% visited the Niagara region)	**No**
Overnight Pleasure Visitors From Overseas Entering Canada Through Non-Ontario Ports				
Prescott/ Stormont	**Yes** (processed 19.8% of Ontario's overnight pleasure visitors from overseas)	**Yes** (at least 97.3% visited other Ontario regions)	**No** (only 2.7% visited the area)	**No**
Toronto	**No** (processed only 8.3% of these Ontario visitors)	**No** (only 33.7% visited other Ontario regions)	**Yes** (100% visited Toronto)	**No**
All Overnight Pleasure Visitors From Overseas Entering Canada Through All Ports				
Toronto	**Yes** (processed 51.0% of Ontario's overnight pleasure visitors from overseas)	**Yes** (62.4% visited other regions)	**Yes** (71.9% visited Toronto)	**Yes**
Prescott/ Stormont	**Yes** (processed 19.8% of Ontario's overnight pleasure visitors from overseas)	**Yes** (at least 97.3% visited other Ontario regions	**No** (only 2.7% visited the area)	**No**
Niagara Falls	**Yes** (processed 16.7% of Ontario's overnight pleasure visitors from overseas)	**No** (only 46.2% visited other Ontario regions)	**Yes** (72.6% visited the Niagara region)	**No**

- **For the overnight pleasure visitors from overseas who entered Canada through Ontario's ports in 1996, there were two provincially significant ports: Toronto and Niagara Falls, accounting for 85.4% (Toronto 62.7% and Niagara Falls 22.8%) of these visitors.**

- The overnight pleasure visitors from overseas who entered Canada through Toronto' ports played an important role in the Niagara region's total overnight pleasure visitors from overseas (30.2%), Ottawa's (36.5%), Northern Ontario's (45.2%), as well as Toronto's (48.7%).

- Niagara, Toronto and Ottawa were the only regions with significant visitation levels irrespective the provincial point of entry. These non-neighbouring regions appear to form a virtual travel region, while all other travel regions do not appear to be very relevant as far as the overnight pleasure visitors and their overnight excursions are concerned.

- The majority of the overnight overseas visitors (57.9% overall) who entered Canada through Ontario's ports while on a pleasure trip, visited only one county/district. On average these visitors visited 1.61 Ontario regions, while those who had a visit in the province visited on average 1.70 regions. These averages are higher than the overnight US pleasure visitors' who entered Canada through the Ontario ports (1.16 and 1.20 regions respectively).

- Of the overnight pleasure visitors from overseas who visited Ontario but entered Canada through a non-Ontario port, the majority visited two or more counties (57.2%). Overall, the average number of Ontario regions visited by these visitors was 2.9.

- There does not appear to be a relationship between gateways/non-gateways and average length of stay in Ontario, while the relationship between number of regions visited and average length of stay is not as strong here as it was for the overall overseas visitors, especially for Toronto.

Overnight Pleasure-Overseas	Port Of Entry Into Ontario		
	All Ontario Ports	Niagara Falls	Toronto
Number of Regions Visited	Average Length Of Stay In Ontario		
Only the region of the port of entry	2.69 nights	1.44 nights	12.25 nights
One Ontario region- other than the port	6.64 nights	2.76 nights	8.15 nights
Two Ontario regions	6.98 nights	4.00 nights	8.38 nights
Three Ontario regions	9.71 nights	3.78 nights	10.55 nights
Four or more Ontario regions	14.23 nights	-	14.31 nights

SECTION C: Travel Regions - Ontario Residents Market

- Overall, each of Ontario's counties/district is an overnight travel region on its own right as far as the overnight visitors from Ontario are concerned.

- An argument could be made that for this market, and at the margin, Frontenac enhances the appeal of Ottawa-Carleton, Toronto enhances the appeal of Niagara, Lambton enhances the appeal of Essex and Haliburton that of Nipissing.

Ontario Residents On Overnight Trips In Ontario, 1996

Name Of County/District	Number Of Overnight Visits With A Destination In...	Number Of Visitors Who Took Overnight Excursions To Other Ontario Regions	Number of Additional Regions Visited	Excursionists As A % Of Total
Toronto	3,025,000	60,000	26	2.0%
Simcoe	2,267,000	25,000	10	1.1%
Ottawa-Carleton	1,431,000	50,000	10	3.5%
Muskoka	1,360,000	11,000	5	0.8%
Niagara	1,029,000	39,000	16	3.8%
Middlesex	942,000	12,000	8	1.3%
Peterborough	898,000	3,000	2	0.3%
Bruce	795,000	16,000	11	2.0%
Parry Sound	753,000	11,000	2	1.5%
Hastings	743,000	15,000	8	2.0%
Frontenac	731,000	21,000	8	2.9%
Waterloo	636,000	9,000	4	1.4%
Essex	625,000	34,000	10	5.4%
Renfrew	617,000	12,000	6	1.9%
Haliburton	598,000	4,000	2	0.7%
Durham	561,000	5,000	4	0.9%
Nipissing	522,000	23,000	5	4.4%
Lambton	522,000	20,000	5	3.8%
Sudbury RM	419,000	14,000	8	3.3%
Algoma	393,000	14,000	5	3.6%
Thunder Bay	354,000	18,000	7	5.1%

SECTION C: Travel Regions - The Quebec Market

- As far as the overnight Quebec market is concerned, every Ontario region is an overnight travel region on its own right.
- Some interaction, but minimal, does occur between Toronto, Ottawa and the Niagara region.

Quebec Residents On Overnight Trips To Ontario, 1996				
Name Of County/District	Number Of Overnight Visits With A Destination In...	Number Of Visitors Who Took Overnight Excursions To Other Ontario Regions	Number of Additional Regions Visited	Excursionists As A % Of Total Overnight Destination Visits
Toronto	510,000	15,000	6	2.9%
Ottawa-Carleton	470,000	2,000	1	0.4%
Frontenac	65,000	-	0	0.0%
Stormont, et all	53,000	-	0	0.0%
Niagara	41,000	4,000	3	9.8%
Renfrew	36,000	-	0	0.0%
Prescott & Russell	25,000	-	0	0.0%
Leeds & Grenville	23,000	-	0	0.0%

SECTION C: Travel Regions - The Manitoba Market

- As far as the overnight Manitoba market is concerned, every Ontario region is an overnight travel region on its own right.
- Some interaction, but minimal, does occur between Thunder Bay and Kenora, however this interaction is one-way, that is, it is the visitors to Thunder Bay that take excursions to Kenora and not the other way around.

Manitoba Residents On Overnight Trips To Ontario, 1996				
Name Of County/District	Number Of Overnight Visits With A Destination In...	Number Of Visitors Who Took Overnight Excursions To Other Ontario Regions	Number of Additional Regions Visited	Excursionists As A % Of Total Overnight Destination Visits
Kenora	209,000	-	0	0.0%
Toronto	63,000	5,000	9	7.9%
Thunder Bay	36,000	4,000	3	11.1%
Ottawa-Carleton	25,000	4,000	2	16.0%
Rainy River	18,000	-	0	0.0%

SECTION C: Travel Regions - The Atlantic Canada Market

Residents Of Atlantic Canada On Overnight Trips To Ontario, 1996				
Name Of County/District	Number Of Overnight Visits With A Destination In...	Number Of Visitors Who Took Overnight Excursions To Other Ontario Regions	Number of Additional Regions Visited	Excursionists As A % Of Total
Toronto	138,000	19,000	9	13.8%
Ottawa-Carleton	78,000	2,000	1	2.6%
Niagara	10,000	6,000	5	60.0%
Peel	8,000	2,000	3	25.0%
Simcoe	6,000	1,000	2	16.7%

- Although the regions Toronto-Simcoe-Ottawa-Carleton and Niagara-York-Peel appear to be important to each other as far as the Atlantic Canada visitors are concerned, and as such form virtual travel regions, this market is too small to warrant the creation of a travel region.

- In addition to the above regional interactions, Ottawa seems to enhance Toronto's appeal as far as the overnight visitors from Atlantic Canada are concerned.

SECTION C: Travel Regions - The Western Canada Market

- Ottawa-Carleton appears to be enhancing Toronto's appeal to visitors from western Canada, although the reverse is not true.

- For those who visit Ottawa-Carleton as a destination, the region is a travel region on its own.

Residents Of Western Canada On Overnight Trips To Ontario, 1996				
Name Of County/District	Number Of Overnight Visits With A Destination In...	Number Of Visitors Who Took Overnight Excursions To Other Ontario Regions	Number of Additional Regions Visited	Excursionists As A % Of Total
Toronto	272,000	25,000	7	9.2%
Ottawa-Carleton	91,000	6,000	6	6.6%

SECTION C: Travel Regions - The US Market

- US overnight visitors to Ontario move around the province more than the domestic visitors do and as such there are more opportunities for the formation of travel regions in this market than there are in the domestic market, especially along the corridors:
  - Windsor-Toronto
  - Sarnia-Toronto
  - Niagara-Toronto
  - Leeds & Grenville-Toronto
  - Leeds & Grenville-Ottawa, and to a lesser extent
  - Leeds & Grenville-Northern Ontario

US Visitors On Overnight Trips To Ontario, 1996				
Place Visited	**Number Of Overnight Visits**	**Number Of Visitors Who Visited Other Ontario Regions**	**Number of Additional Regions Visited**	**Excursionists As A % Of Total Overnight Visitors**
Toronto	2,181,000	435,000	44	19.9%
Niagara	1,452,000	341,000	37	23.5%
Essex	454,000	35,000	12	7.7%
Ottawa-Carleton	377,000	125,000	31	33.2%
Algoma	286,000	20,000	11	7.0%
Leeds & Grenville	233,000	48,000	19	20.6%
Thunder Bay	231,000	39,000	17	16.9%
Kenora	208,000	20,000	11	9.6%
Perth	174,000	47,000	19	27.0%
Frontenac	162,000	72,000	27	44.4%
Middlesex	160,000	52,000	26	32.5%

- As far as the overnight US visitors to Toronto are concerned, it appears that a number of Ontario regions enhance Toronto's appeal to these visitors. In particular Niagara, Ottawa-Carleton, Frontenac and Grey.

- Toronto does not seem to form in any significant way a region with any other neighbouring counties. Some interaction was observed with Durham, York and Peel, but that interaction was minimal. If there is any region that interacts with Toronto in a significant way then that's Niagara and Ottawa which form a virtual travel region with Metro.

- With the exception of Ottawa and Grey, many of the overnight excursions of the US visitors to

Toronto appear to be on the way to Toronto/home. As such, the corridors Niagara-Toronto, Windsor-Toronto, Sarnia-Toronto and to a lesser extent Ottawa-Leeds & Grenville-Toronto, are important in terms of enhancing and diversifying a US visitor's trip experience to Toronto.

- It appears that Toronto is the main region that significantly enhances Niagara's appeal to the US visitors. However, the opposite is not true. That is, only a small number of US overnight visitors who entered Canada through Toronto visited Niagara.
- The Niagara-Toronto-Frontenac-Leeds & Grenville corridor appears to be an important touring corridor due, in part, to the Leeds & Grenville ports (Gananoque, Brockville, Prescott). Some minor opportunities may exist in diverting some of the traffic that moves along this corridor to visit Ottawa, as not all of the overnight US visitors who make it to Frontenac take the time to visit Ottawa.
- The Niagara region interacts mainly with the Ontario regions that form OTAPs 4, 5 and 6.
- As far as the overnight US visitors to Ottawa-Carleton are concerned, it appears that the region enhances Toronto's appeal to those visitors, however the opposite is not true. That is, only a small number of US overnight visitors who entered Canada through Ottawa-Carleton Toronto.
- The Ontario regions that benefit the most by the Americans who visited Ottawa-Carleton are those that contain international ports, such as Toronto, Leeds & Grenville, Frontenac, Stormont, Dundas & Glengarry and Niagara.
- Although Toronto, Ottawa and Niagara appear to form a virtual travel region for the overnight US visitors to Ontario, the impact that the Ottawa-Carleton visitors make to Toronto's and Niagara's total US visitation is insignificant.
- Essex appears to be a travel region on its own right as far as the US visitors are concerned. However, some minimal interaction exists between Essex and Toronto.
- Kenora is a travel region on its own right as far as the US visitors are concerned. Some minimal interaction exists between Kenora and Rainy River, due primarily to the fact that the international ports of entry into Ontario are located in Rainy River.
- Algoma appears to be a travel region on its own right as far as the US visitors are concerned. Some interaction exists between Algoma and Thunder Bay, but this interaction could very well be due to the fact that a number of US visitors who visited Thunder Bay entered Ontario through Sault Ste. Marie (15,000 of them did so), or a number of US visitors who entered Ontario through Rainy River and visited Thunder Bay (53,000 did so) exited the province through Sault Ste. Marie.
- For the overnight US visitors, Leeds & Grenville appears to be a travel region with Frontenac.
- Due to a number of important international ports that it contains, Leeds & Granville is situated on the important Leeds & Grenville-Ottawa-Carleton corridor.
- Although Perth could be considered a travel region on its own right, as far as the overnight US visitors are concerned, an argument could be made for Perth to form a travel region with Waterloo.
- A more significant interaction than that observed between Perth and Waterloo exists between Perth,

Toronto and Niagara, all three regions enhancing each other's appeal to these visitors. However, Perth does not play as significant a role in the Toronto and Niagara markets as they play for Perth.

- As far as the overnight US visitors to Frontenac are concerned, it appears that the region could form a travel region with Leeds & Grenville and Ottawa-Carleton. It could also form a virtual travel region with Toronto and Niagara, although Frontenac is not as important to Toronto and Niagara as these two regions are for Frontenac.

- Frontenac appears to be well located on three important corridors: The Quebec border-Toronto-Niagara corridor, the Leeds & Grenville-Toronto-Niagara corridor and the Leeds & Grenville-Ottawa corridor.

- As well, but of a lesser importance, Frontenac is well placed on the Leeds & Grenville-Northern Ontario corridor.

- Due perhaps to its location, Frontenac may play more of a role in the US touring market rather than the US market that takes trips to Ontario with a specific destination in mind.

- As far as the overnight US visitors to Middlesex are concerned, it appears that the region could form a travel region with Kent. It could also form a virtual travel region with Toronto and Niagara, although the region is not as important to Toronto and Niagara as these two regions are for Middlesex.

- Middlesex appears to be well located on two important corridors: The Windsor-Toronto-Niagara corridor and the Sarnia-Toronto-Niagara corridor. Due perhaps to its location, Middlesex may play more of a role in the US touring market rather than the US market that takes trips to Ontario with a specific main destination in mind.

SECTION C: Travel Regions - The Overseas Market

- Overseas overnight visitors to Ontario move around the province more than the domestic visitors and the US visitors do and as such there are more opportunities for the formation of travel regions in this market than there are in the domestic or the US market, especially along the circular corridor of:
  - Niagara-Toronto-Frontenac-Leeds & Grenville-Ottawa-Algonquin Park- Muskoka-Simcoe-Toronto

Overseas Visitors On Overnight Trips To Ontario, 1996

Place Visited	Number Of Overnight Visits	Number Of Visitors Who Visited Other Ontario Regions	Number of Additional Regions Visited	Excursionists As A % Of Total Overnight Visitors
Toronto	1,397,000	611,000	46	43.7%
Niagara RM	616,000	388,000	39	63.0%
Ottawa-Carleton	473,000	342,000	36	72.3%

- Toronto, the Niagara region and Ottawa-Carleton accounted for 79.9% of the overnight overseas visitors to Ontario in 1996.

- As far as the overnight overseas visitors are concerned, Toronto is an important feeder market for all Ontario regions.

- For these visitors, Toronto forms at least a one-way travel region with almost every county or district in Ontario and a two-way virtual travel region with Niagara and Ottawa.

- The main region of interest to those overnight overseas visitors who visited Toronto seems to include the circular corridor of Niagara-Simcoe-Muskoka-Algonquin Park-Ottawa-Frontenac-Toronto.

- Toronto is also an important destination region for these visitors as a majority of them (56.3%) visited only Metro.

- Although Niagara is not as important a destination as Toronto is for the overnight overseas visitors to Ontario, it does enhance Toronto's, and Ontario's, appeal to these visitors.

- The region formed by Muskoka-Algonquin Park-Ottawa-Leeds & Grenville -Frontenac -Toronto -Niagara -Simcoe, forms a travel region for the overnight overseas visitors who visited Niagara.

- Although Ottawa-Carleton is not as important a destination as Toronto is for this market, it does enhance Toronto's, and Ontario's, appeal to these visitors.

- The region formed by Muskoka-Algonquin Park-Ottawa-Leeds & Grenville-Frontenac-Toronto-Niagara-Simcoe, forms a travel region for the overnight overseas visitors who visited Ottawa-Carleton.

SECTION C: Travel Regions - The Domestic Pleasure Market

- Overall, as far as the overnight pleasure visitors from Ontario are concerned, every Ontario county/district is a travel region on its own right.

- However, some minimal interaction was observed between the following regions:
  - Toronto and Simcoe
  - Niagara, Hamilton and Toronto
  - Ottawa-Carleton, Frontenac, Peterborough, Hastings and Algonquin Park
  - Nipissing and Haliburton

- Toronto and Ottawa-Carleton form a weak virtual travel region as far as the overnight pleasure visitors from Quebec are concerned. However, this an one-way relationship in the sense that although Ottawa-Carleton enhances the appeal of Toronto to the Quebec residents who take a trip with a destination in Toronto, the opposite is not true.

- Niagara is a travel region in its own right as far as the overnight pleasure visitors from Quebec are concerned. However, there is a weak one-way relationship with Toronto.

Ontario Residents On Overnight Pleasure Trips In Ontario, 1996				
Name Of County/District	Number Of Overnight Visits With A Destination In...	Number Of Visitors Who Took Overnight Excursions To Other Ontario Regions	Number of Additional Regions Visited	Excursionists As A % Of Total
Simcoe	1,335,000	14,000	6	1.0%
Muskoka	1,045,000	7,000	3	0.7%
Toronto	687,000	21,000	16	3.1%
Peterborough	581,000	2,000	1	0.3%
Bruce	546,000	13,000	8	2.4%
Niagara	532,000	31,000	12	5.8%
Haliburton	479,000	2,000	1	0.4%
Parry Sound	455,000	10,000	2	2.2%
Frontenac	371,000	6,000	3	1.6%
Ottawa-Carleton	340,000	34,000	8	10.0%
Renfrew	340,000	1,000	1	0.3%
Hastings	338,000	8,000	6	2.4%
Lambton	241,000	4,000	1	1.7%
Nipissing	239,000	20,000	4	8.4%
Victoria	216,000	0	0	0.0%
Haldimand-Norfolk	210,000	2,000	1	1.0%
York	205,000	0	0	0.0%
Algoma	189,000	6,000	3	3.2%
Thunder Bay	157,000	8,000	6	5.1%

- Kenora is a travel region in its own right as far as the overnight pleasure visitors from Manitoba are concerned.

- Toronto, Ottawa-Carleton and Niagara can be considered as a virtual travel region as far as the overnight pleasure visitors from the Atlantic provinces are concerned.

- Toronto, Ottawa-Carleton and Niagara can be considered as a virtual travel region as far as the overnight pleasure visitors from western Canada are concerned. However, this relationship is one-way in the sense that although Niagara and Ottawa-Carleton appear to enhance Toronto's appeal to these visitors the opposite is not true. That is, of the overnight pleasure visitors from western Canada who took a trip with a destination in Ottawa-Carleton or Niagara, none visited Toronto.

SECTION C: Travel Regions - The US Pleasure Market

- The following corridors are significant for the movement of overnight US pleasure visitors, partly because Windsor, Sarnia, Niagara and Leeds & Grenville (Gananoque, Brockville, Prescott) can be used as entry or exit points by Americans living in the states of New York and Michigan:
    - Niagara-Toronto-Frontenac-Leeds & Grenville-Ottawa
    - Windsor-Toronto
    - Sarnia-Toronto
    - Niagara-Toronto

- As far as the overnight US pleasure visitors to Niagara are concerned, it appears that Toronto is the main region that significantly enhances Niagara's appeal to these visitors. However, the opposite is not true. That is, only a small number of US overnight visitors who entered Canada through Toronto visit Niagara (8.6% or 18,000).

US Pleasure Visitors On Overnight Trips To Ontario, 1996				
Place Visited	**Number Of Overnight Visits**	**Number Of Visitors Who Visited Other Ontario Regions**	**Number of Additional Regions Visited**	**Excursionists As A % Of Total Overnight Visitors**
Toronto	1,076,000	301,000	35	28.0%
Niagara	1,149,000	250,000	32	21.8%
Algoma	252,000	69,000	21	27.4%
Ottawa-Carleton	208,000	84,000	20	40.4%
Essex	208,000	22,000	7	10.6%
Leeds & Grenville	179,000	39,000	12	21.8%
Thunder Bay	165,000	33,000	11	20.0%
Kenora	157,000	15,000	9	9.6%
Perth	152,000	34,000	13	22.4%
Frontenac	110,000	51,000	17	46.4%

- As far as the overnight US pleasure visitors to Toronto are concerned, it appears that Niagara is the main region that significantly interacts with Toronto, followed by Ottawa-Carleton.

- With the exception of Ottawa and Grey, many of the overnight excursions of the US overnight pleasure visitors to Toronto appear to be on the way to Toronto/home. As such, the corridors Niagara-Toronto, Windsor-Toronto, Sarnia-Toronto and to a lesser extent Toronto-Leeds & Grenville-Ottawa, are important in terms of enhancing and diversifying a US visitor's trip experience to Toronto.

- Ottawa-Carleton appears to be enhancing Toronto's appeal to the overnight US pleasure visitors those visitors. However the opposite is not true. That is, only a small number of US overnight pleasure visitors who entered Canada through Ottawa-Carleton visited Toronto.

- The Ontario regions that benefit the most by the Americans who visited Ottawa-Carleton while on a pleasure trip are those that contain international ports into Canada, such as Toronto, Leeds & Grenville, Frontenac, Leeds & Grenville, Algoma and Niagara.

- Although Toronto, Ottawa and Niagara appear to form a virtual travel region for the overnight US pleasure visitors to Ontario, the impact that the Ottawa-Carleton visitors make to the other two regions is insignificant.

- Essex is a travel region on its own right. Some minimal interaction exists between Essex and Toronto.

- Since Essex is on the important Windsor-Toronto corridor, there is an opportunity to retain more the overnight US pleasure visitors who enter Ontario through Windsor than is presently the case. Of the 647,000 overnight US pleasure visitors who entered Ontario through Windsor, 206,000 visited Toronto and only 119,000 visited Essex.

- Perth could be considered a travel region on its own right. However, an argument could be made for Perth to form a travel region with Waterloo.

- Although there is an interaction between Perth, Toronto and Niagara, all three regions enhancing each other's appeal to these visitors, Perth does not play as significant a role in the Toronto and Niagara markets.

- Leeds & Grenville is by and large a travel region on its own right for this market. A case could be made that for Leeds & Grenville and Frontenac to form a travel region, while Niagara and Ottawa-Carleton seem to enhance Leeds & Grenville's appeal to this market.

- Frontenac could form a travel region with Leeds & Grenville and Ottawa-Carleton. It could also form a virtual travel region with Toronto and Niagara, although the region is not as important to Toronto and Niagara as these two regions are for Frontenac.

- Frontenac appears to be well located on three important corridors: The Quebec border-Toronto-Niagara corridor, the Leeds & Grenville-Toronto-Niagara corridor and the Leeds & Grenville-Ottawa corridor.

- As well, but of a lesser importance, Frontenac is well placed on the Leeds & Grenville-Northern Ontario corridor.

- Due perhaps to its location, Frontenac may play more of a role in the US touring market rather than the US market that takes trips to Ontario with a specific main destination in mind.

- Algoma is to a large extent a travel region on its own right for the US pleasure visitors. Some interaction exists between Algoma and Thunder Bay, while some other regions, in particularly Victoria, seem to act as resting places for these travellers while they are attempting to reach their destination/home.

- Thunder Bay is a travel region on its own right for this market. Some interaction exists between Algoma and Thunder Bay, but this interaction could very well be due to the fact that a number of US visitors who visited Thunder Bay entered Ontario through Sault Ste. Marie (15,000 of them did so), or a number of US visitors who entered Ontario through Rainy River and visited Thunder Bay (51,000 did so) exited the province through Sault Ste. Marie.

- Kenora is a travel region on its own right for the overnight US pleasure visitors. Some minimal interaction exists between Kenora and Rainy River, due primarily to the fact that the international ports of entry into Ontario are located in Rainy River.

SECTION C: Travel Regions - The Overseas Pleasure Market

- The overnight overseas visitors who visit Ontario while on a pleasure trip constitute a truly touring market segment.

- The circular corridor formed by Muskoka-Algonquin Park-Ottawa-Leeds & Grenville-Frontenac-Toronto-Niagara-Simcoe, forms a touring region for these visitors, especially its southern portion.

- As far as the overnight pleasure visitors from overseas are concerned, Toronto is an important feeder market for all Ontario regions.

- For these visitors, Toronto forms at least a one-way travel region with almost every county or district in Ontario and a two-way virtual travel region with Niagara and Ottawa.

- Although Niagara is not as important a destination as Toronto is for the overnight overseas pleasure visitors to Ontario, it does enhance Toronto's, and Ontario's, appeal to these visitors.

- An insignificant number of overnight pleasure visitors from overseas countries who entered Ontario through Niagara Falls ventures into Ontario's southwestern regions.

Overseas Visitors On Overnight Trips To Ontario, 1996

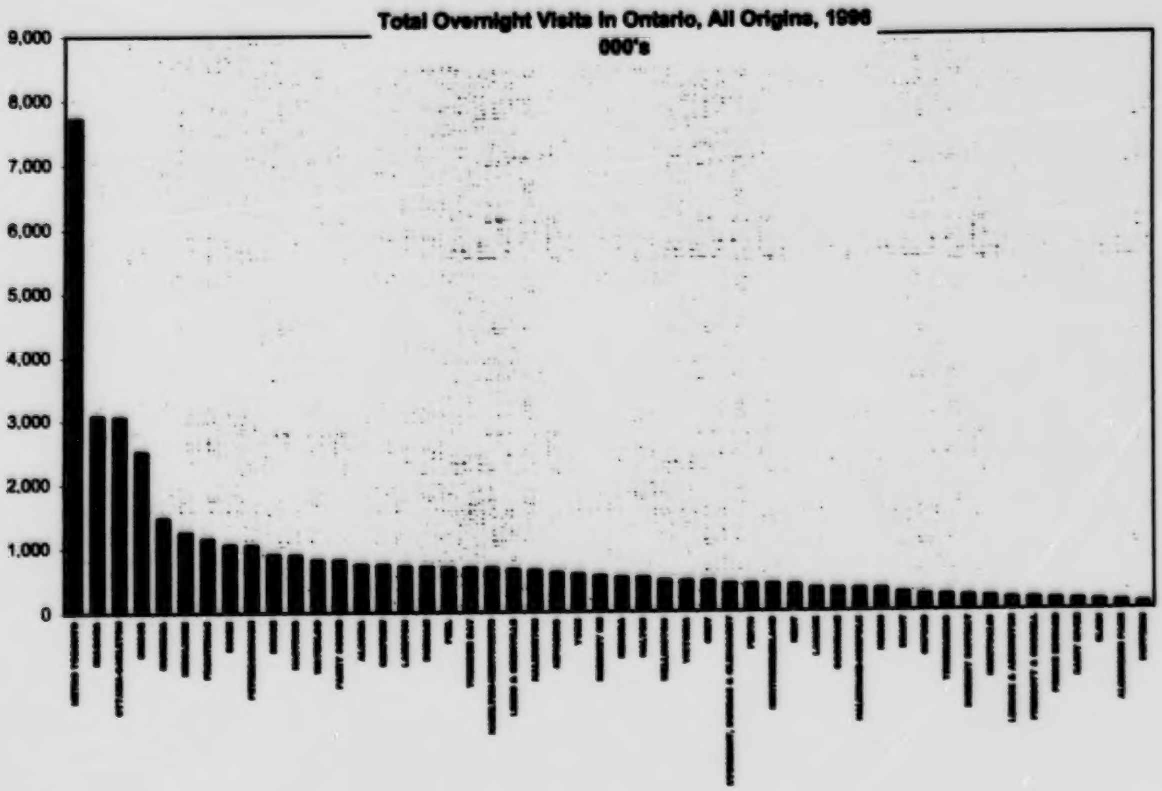
Place Visited	Number Of Overnight Visits	Number Of Visitors Who Visited Other Ontario Regions	Number of Additional Regions Visited	Excursionists As A % Of Total
Toronto	755,000	401,000	39	53.1%
Niagara RM	451,000	283,000	35	62.7%
Ottawa-Carleton	275,000	246,000	33	89.5%

- Although Ottawa is not as important a destination as Toronto and Niagara are for these visitors, it does enhance Toronto's, and Ontario's, appeal to these visitors.

A. Regional Rankings

A.1. Total Overnight Visits

In 1996, 38.9 million visitors stayed in Ontario for one or more nights. Of these, 37.8 million, or 97%, recorded their place of destination or overnight stop within Ontario.



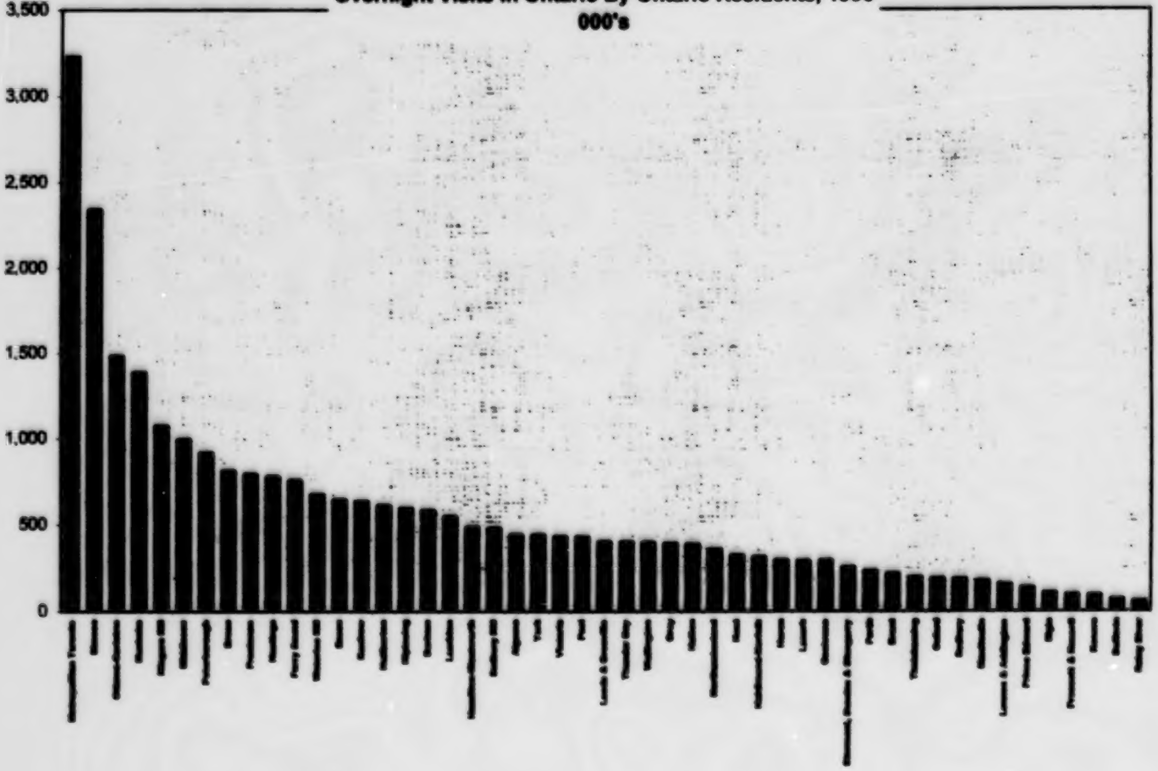
Metropolitan Toronto stood out as the region with the most visits accounting for 20.4% of Ontario's total overnight visits with known sub-provincial destinations. Toronto's overwhelming dominance was evident in most markets - it accounted for 66.5% of the overnight overseas visitors to Ontario, 33.8% of the US visitors, and 14.7% of the domestic visitors.

The Niagara region (regional municipality) was the second most visited region in Ontario accounting for 8.1% of the overnight visits to Ontario, while Ottawa-Carleton was third accounting for 8.1%.

Simcoe county was the fourth most visited Ontario region accounting for 6.6% of the provincial overnight visits, while the district municipality of Muskoka was fifth accounting for 3.9%.

Of the total overnight visitors who visited Simcoe (2.51 million), 20.2% visited Midland, 18.8% visited Barrie, 18.6% visited Collingwood, 18.5% visited Orillia and 23.9% visited other parts of Simcoe.

Contrary to the first three most popular Ontario regions, Simcoe and Muskoka owe their popularity mainly to the domestic visitors - 93% of the Simcoe overnight visitors and 95% of the Muskoka overnight visitors were Canadian residents.



Middlesex and Frontenac were the remaining two Ontario regions with a share of overnight visitors greater than three per cent (3.3% and 3.0%, respectively). Every other Ontario county or district accounted, in 1996, for less than 3.0% of the provincial overnight visitors.

Of the 1.149 million overnight visitors who visited Frontenac, 81.5% visited Kingston and the remaining 18.5% other parts of the county.

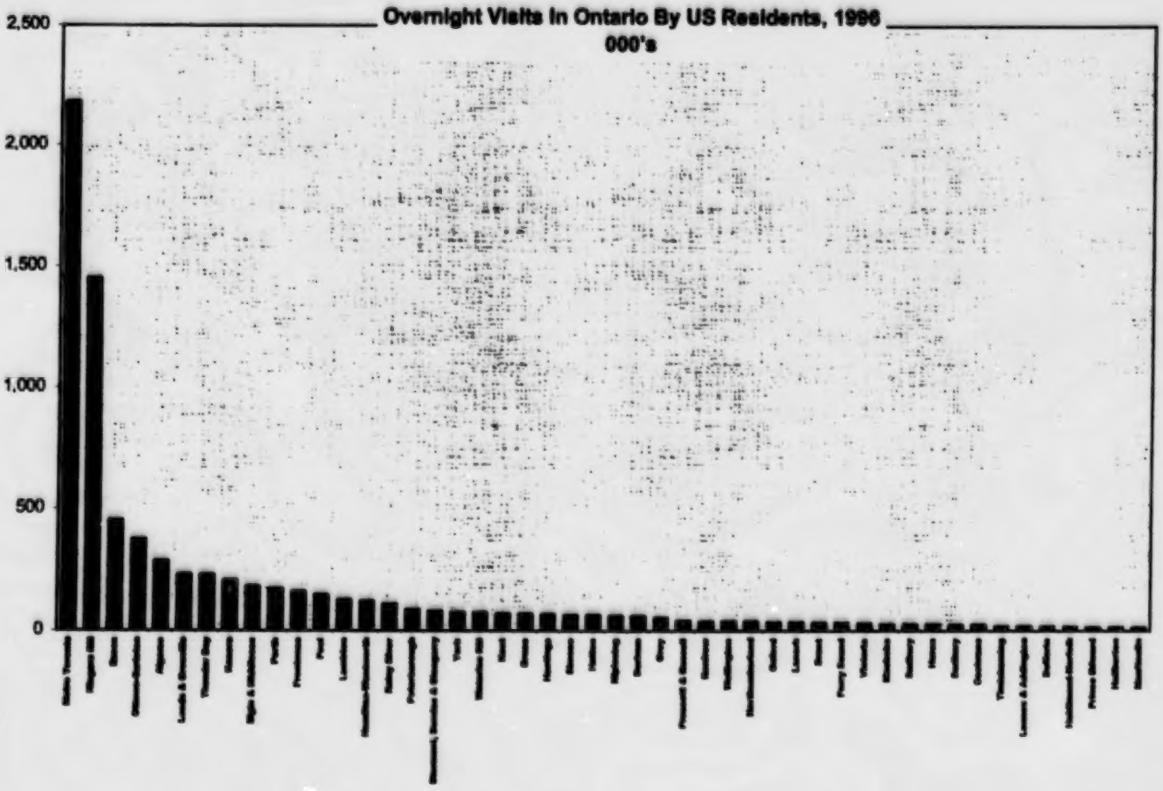
Of the remaining counties Essex and Peterborough were the only two that received over 1.0 million visitors (Essex 1.059 million and Peterborough 1.048 million). Most of the visitors to Essex (73.5%) visited Windsor, while most of the visitors to Peterborough county visited Peterborough (74.5%).

Of Ontario's northern districts, the ones that ranked the highest were in northeastern Ontario: Parry Sound received 814,000 overnight visitors (or 2.2% of the total), Algoma received 743,000 (or 2.0% of the total) and Nipissing, with Algonquin Park, received 732,000 (or 1.9% of the total).

The Thunder Bay district was ranked the highest among the northwestern districts with 691,000 overnight visits, or 1.8% of Ontario's total, followed by Kenora (532,000, or 1.4% of the total).

Of those who visited Algoma, 55.7% visited Sault Ste. Marie, 8.1% Elliot Lake and 36.2% other parts of the district.

North Bay received 61.5% of the overnight visitors who visited Nipissing, Algonquin Park received 16.4% and the remaining 22.1% visited other parts of the district.



The Thunder Bay CMA received 70.8% of the overnight visitors who visited the Thunder Bay district.

Overnight visitors from the US favoured Metro Toronto (33.8%), followed by Niagara RM (21.1%), Ottawa-Carleton (6.0%), Essex (5.8%), Algoma (3.8%) and Kenora (3.4%).

Overnight visitors from overseas countries favoured Toronto (66.5%), followed by Niagara RM (31.8%), Ottawa-Carleton (7.5%) and Peel (4.4%).

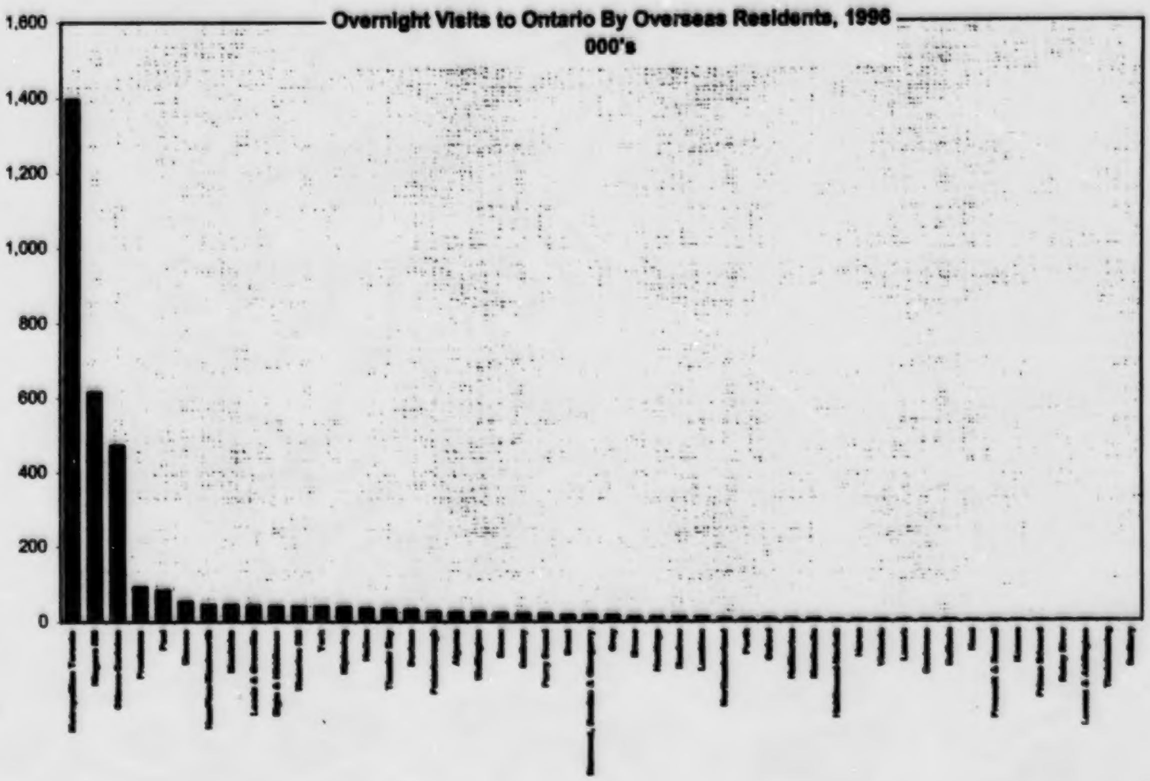
Ontario residents favoured Toronto (12.0%), followed by Simcoe (8.7%), Ottawa (5.5%), Muskoka (5.2%), Niagara RM (4.0%), Middlesex (3.7%), Peterborough (3.4%), Bruce (3.0%), Frontenac (3.0%) and Hastings (2.9%).

Quebec residents favoured Toronto (35.9% of the visits with known provincial region visited), followed by Ottawa-Carleton (32.9%) and Stormont, Dundas & Glengarry (6.4%).

Manitoba residents favoured the Kenora district (53.1%), followed by Toronto (19.4%) and the Thunder Bay district (11.5%).

Visitors from Atlantic Canada favoured Toronto (49.9%) and Ottawa-Carleton (26.6%), while visitors from western Canada favoured Toronto (57.8%), Ottawa-Carleton (18.5%) and Middlesex (4.1%).

Ontario residents travelled relatively short distances when visiting provincial destinations. In 1996, the median distance travelled by Ontario residents in order to reach their Ontario destinations was 173 Kms, while the average was 225 Kms. For the counties located in southern Ontario, residents travelled on average 206 Kms to reach their destinations.



Conclusions:

- The US market is dominated by two regions: Toronto and Niagara,
  The overseas market by three regions: Toronto, Niagara and Ottawa,
  The Manitoba market one region: Kenora,
  The Quebec market by two regions: Toronto and Ottawa,
  The Western Canada market by two regions: Toronto and Ottawa, and
  The Atlantic Canada market by two regions: Toronto and Ottawa.

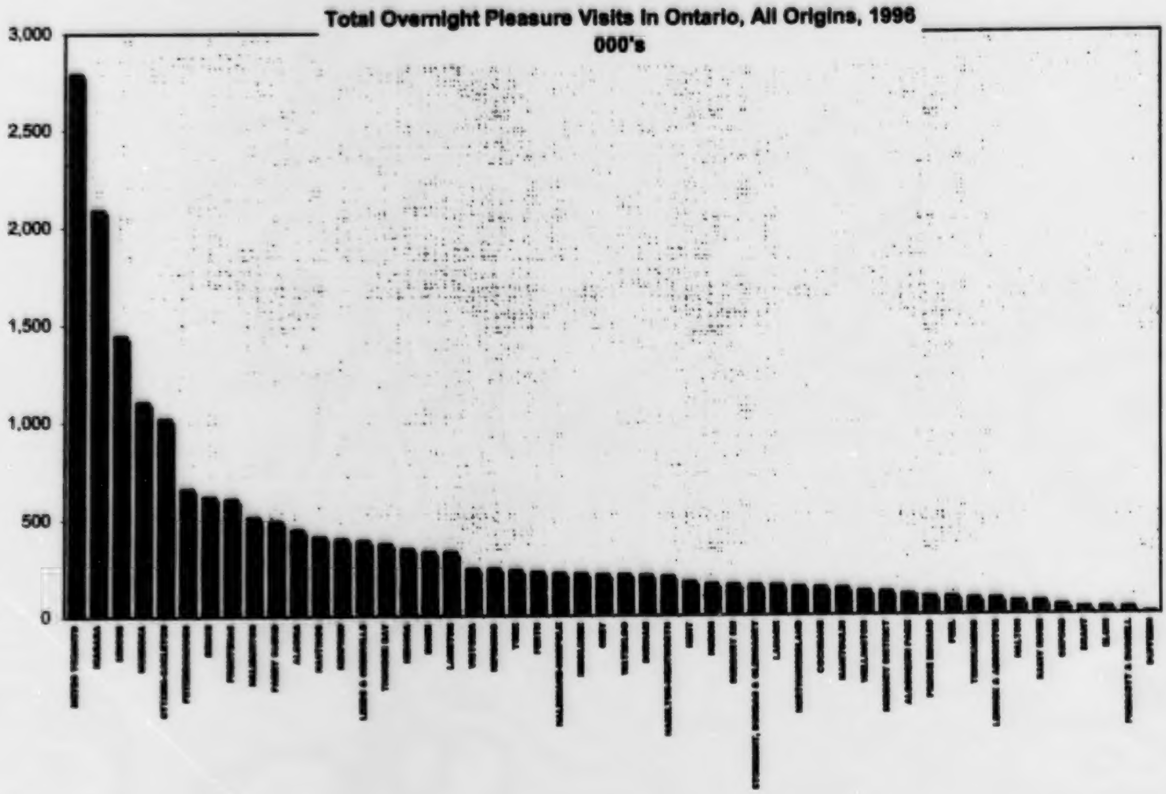
- The Ontario residents' market was much more widely distributed across the province in the sense that it took, in 1996, over 10 regions to account for 50% of the these visitors.

- The US and overseas markets (as well as the Atlantic Canada, western Canada and Quebec markets) have more of an urban orientation, while the Ontario resident market has more of a rural orientation. This is also supported by data on the kind of activities that visitors engage in (see Tourism Monographs No 11, 12 and 13 published by MEDTT).

- The widespread distribution of the Ontario residents' market over the provincial counties is due to the fact that on average, Ontario residents tend to cross 1.4 counties plus their own to get to their Ontario destinations[1]. As such, the majority of the supply of Ontario visitors to each of Ontario's regions came, in 1996, from the county itself (except for Toronto) and its immediate neighbours.

- Given that on average it takes 33 Kms to cross one's county when visiting a southern county and that the southern counties had an area of 2,798 square kilometres (or a square whose sides were 53 Kms each), it follows that on average an Ontario resident crossed 3.3 counties plus his/her own when taking an overnight trip destined to a southern county.

A.2. Overnight Pleasure Visits



A total of 17.38 million visitors travelled in Ontario for pleasure in 1996. Although Metro Toronto dominated the overnight pleasure market as well, its share of total overnight pleasure visits declined to 16.6%, while the share of the Niagara region increased to 12.4%.

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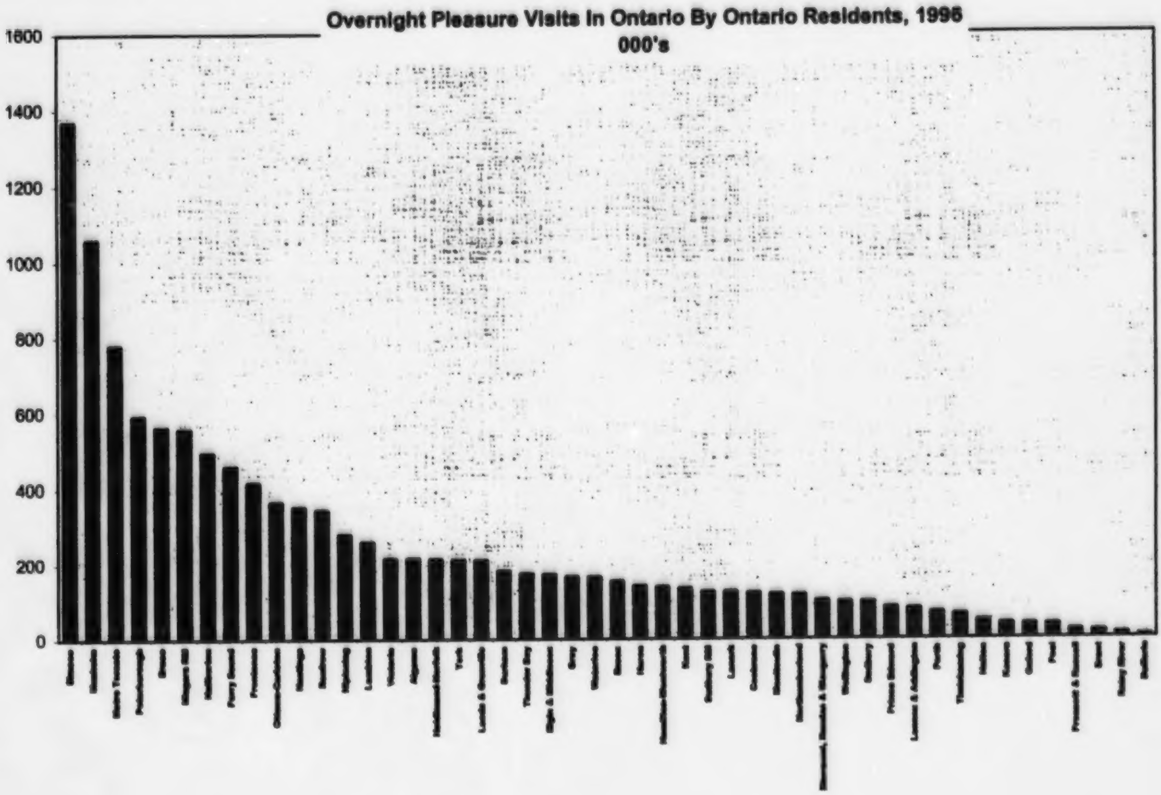
[1] The average size of Ontario's counties/districts is 18,709 square kilometers (or a square whose sides are 137 kms each). Based on the size of each of Ontario's counties, the existing road network, the population distribution within each county and the assumption that each direction from a county outwards is equally likely to be taken by its residents, it took an Ontario resident, on average, 35 kms to cross his/her county. As such, to cross one's own county and one more it takes, on average, 172 Kms. Since the average distance travelled was 225 Kms, it follows that Ontario residents crossed on average 1.4 counties plus their own to get to their Ontario destinations.

Simcoe county and Muskoka overtook Ottawa-Carleton, which declined to the fifth position, while Peterborough county and Bruce overtook Frontenac and placed 6th and 7th, respectively.

Of the 1.444 million overnight pleasure visitors that visited Simcoe, 24.3% visited Midland, 21.9% visited Collingwood (which overtook Barrie in this market), 20.3% visited Orillia, 11.6% visited Barrie and 21.9% visited other parts of the county.



Overnight Pleasure Visits In Ontario By Ontario Residents, 1996
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Of the 659,000 overnight pleasure visitors who visited Peterborough county in 1996, 67.5% visited Peterborough and 32.5% visited other parts of the county.

Kingston lost some of its prominence within the Frontenac county as its share declined from 81.5% of the total overnight market, to 74.6% (or 453,000) of the overnight pleasure market.

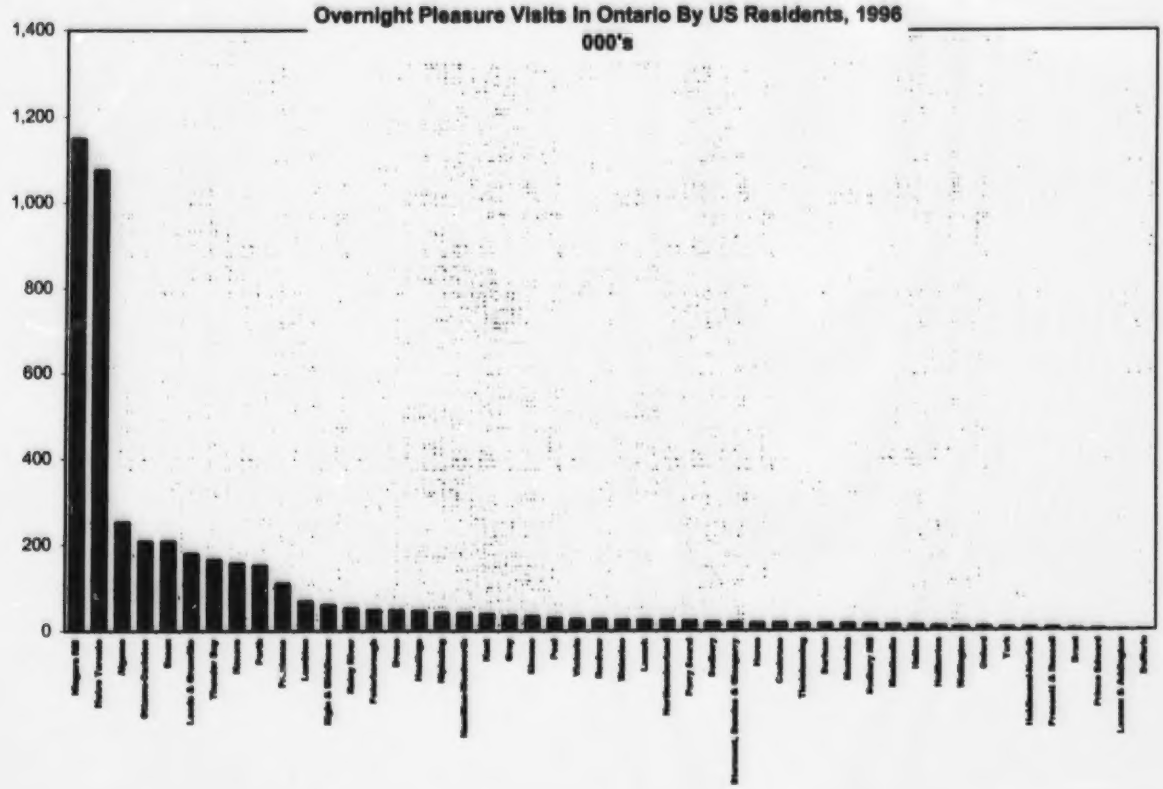
Parry Sound and Algoma maintained their ranking as the top northern regions in the overnight pleasure market receiving 493,000 visitors and 447,000 visitors, respectively. Sault Ste. Marie received 48.3% of Algoma's overnight pleasure visitors, Elliot Lake 5.6%, while the remaining parts of the district increased their share from 36.2% of the total overnight visitors, to 46.1% of the overnight pleasure visitors.

The Thunder bay district overtook Nipissing (including the Algonquin Park) in the overnight pleasure market receiving 376,000 visitors, 60.6% of which visited the Thunder Bay metropolitan area.

The Algonquin Park increased its share of the Nipissing visitors in the overnight pleasure market, receiving 109,000 visitors, or 30.8% of Nipissing's overnight pleasure visitors, while North Bay's share fell from 61.5%

of the district's total overnight visitors, to 44.1% of its overnight pleasure visitors.

The reason for the decline in Toronto's share within the overnight pleasure market, when compared to the total overnight market, was the region's drop to the third most favourite place among Ontario overnight pleasure visitors. Although Metro Toronto and the Niagara region maintained their dominance over the USA and overseas pleasure markets, it was Simcoe and the Muskoka district municipality that dominated the Ontario resident market.



In the US overnight pleasure market, Toronto and Niagara RM were followed, albeit at a distance, by Ottawa, Algoma, Essex, Kenora, Perth (84.6% visiting Stratford) and Thunder Bay.

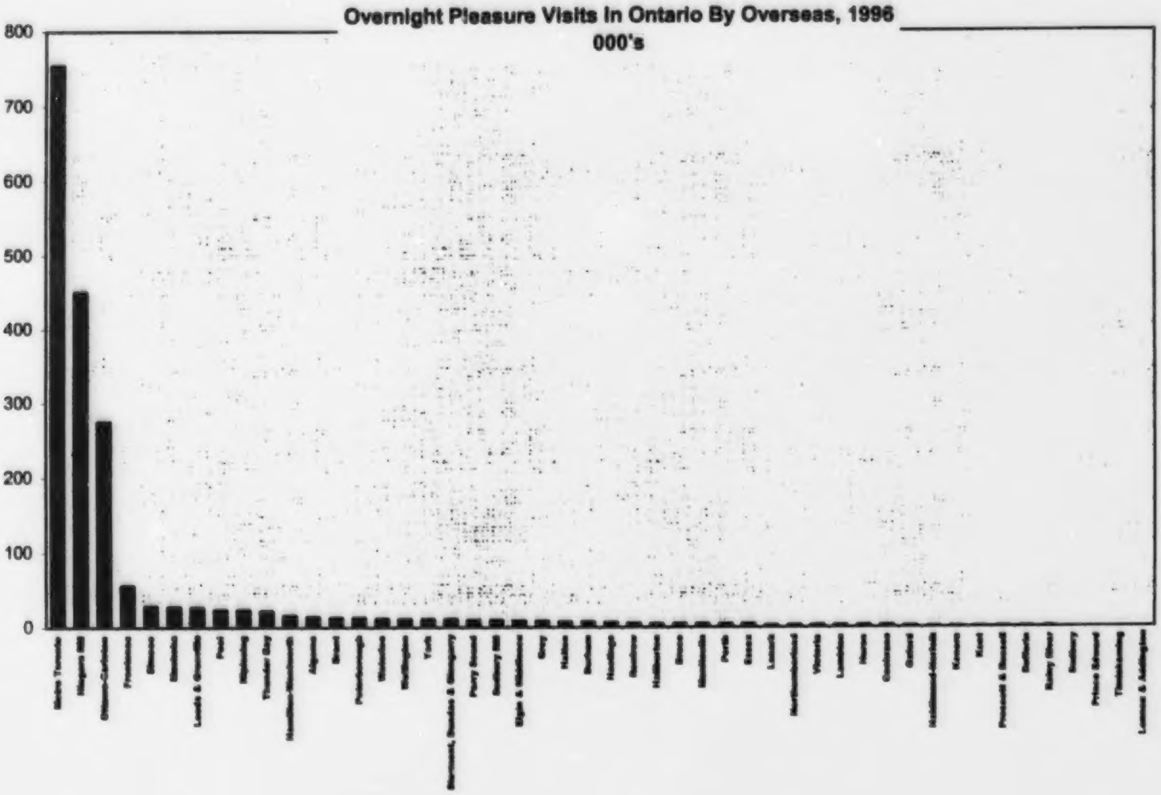
In the overseas overnight pleasure market, Ottawa ranked third after Toronto and Niagara RM, while other regions recorded minimal levels.

Simcoe was the most favourite place among overnight pleasure visitors from Ontario followed by Muskoka, Toronto, Peterborough county, Bruce, Niagara RM and Haliburton.

Ottawa was the most favourite place of overnight pleasure visitors from Quebec, followed by Toronto, while Metro was the favourite place of visitors from Atlantic or western Canada. Overnight pleasure visitors from Manitoba favoured Kenora, followed by Metro Toronto and Thunder Bay.

Most of the Ontario residents who travelled in the province for the purpose of pleasure (61.3%), came from the area that stretches from Niagara to Waterloo to Peterborough (OTAP 4, 23.9%, OTAP 5, 18.8% and

OTAP 2, 18.6%). This region also accounted for a large share (47.5%) of Ontario's population in 1996.



Overnight pleasure visitors from Ontario travelled even shorter distances than other overnight visitors from the province to reach their Ontario destinations (average: 212 Kms, median: 166 Kms), while they travelled, on average, 196 Kms to reach their destinations in southern Ontario.

Conclusions:

- The overnight US pleasure market is dominated by two regions: Toronto and Niagara RM;
- The overnight overseas pleasure market is dominated by three regions: Toronto, Niagara RM and Ottawa;
- The overnight Ontario residents' pleasure market is much more widely distributed than any other market, dominated by eight regions;
- Although Metro Toronto was the top region visited in the overnight pleasure market, its importance was even more significant in the overnight business market where it accounted for 44.3% of all overnight business visits to Ontario.
- Overnight pleasure travellers from Ontario crossed on average 1.3 counties plus their own to reach their Ontario destinations and 3.1 counties plus their own to reach their destinations in southern Ontario.

B. Ontario's International Gateways And Ports Of Entry

B.1. What Is An International Gateway?

We will define here a gateway as a point of entry into the province that meets three conditions: (a) a significant number of visitors go through this point of entry (10% or more of the provincial total), (b) a significant portion (50% or more) of the visitors who go through this point of entry, also visit other Ontario regions, and (c) a significant portion (50% or more) of the visitors who go through this point of entry also visit the region containing the point of entry.

As is the case with all points of entry, gateways are important because they influence the visitors' "first-impressions" of the province, they provide planners with an opportunity to "direct" traffic to other Ontario regions as well as with an opportunity, especially in international ports that are staffed with customs officials, to count the visitors and administer surveys. In addition to these benefits, gateways are important because they themselves are destination regions, and by acting as "main-bases", they distribute these visitors to other Ontario regions. As such, from a supply-side point of view, gateways should also have the appropriate transportation infrastructure to act as transportation hubs. This paper, however, only looks at gateways from a demand point-of-view.

In this section we will examine which Ontario ports are international gateways, their characteristics and whether or not gateways do more than just redistribute a number of visitor-days around the province. We will compare the length of stay of visitors who go through gateways to those that do not. As well, we will examine the length of stay of visitors who go through a specific port, but visit a different number of regions.

B.2. The Total Overnight Market

B.2.1. The Overnight US Market

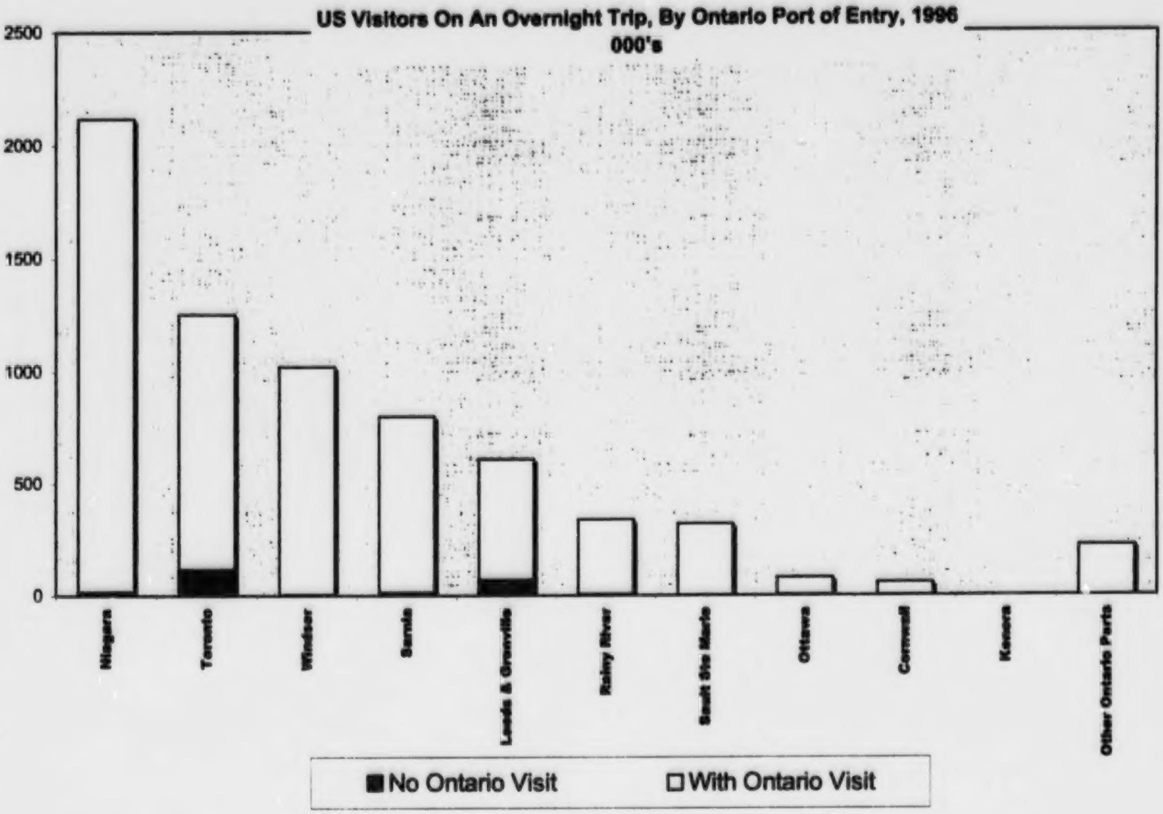
A total of 6,837,000 Americans on an overnight trip entered Canada through Ontario's international ports in 1996. Of those, 3.4% did not visit any Ontario region and 96.6% did. In addition, 186,000 US visitors who spent one or more nights in Ontario entered Canada through a non-Ontario port.

The 3 international ports of the Niagara region processed most of these entries (31.0%), followed by Toronto (18.4%, it includes the 3 air terminals in Peel county, the Toronto seaport and the Toronto Island airport), Windsor (15.0%), Sarnia (11.7%), Leeds & Grenville (8.9%), Rainy River (5.0%) and Sault Ste. Marie (4.7%).

The largest number of US visitors with no Ontario visits (48.9%) entered Canada through Toronto, followed by Leeds & Grenville (29.4%) and Niagara (7.2%). In total, 235,000 of the US visitors who entered Ontario ports for an overnight visit in Canada, did not visit any Ontario region.

Peel had the lowest levels of "Peel-Only" visitation by those US visitors that entered Canada through its ports. Only 5.2% of the US visitors who entered Canada through the Toronto international airport, stayed only in Peel. Of the remaining, 51.1% visited Toronto only, and the rest visited Toronto and one or more counties, or a county other than Toronto. As such, for Toronto and Peel together, 56.3% of the US visitors who entered Canada through their ports visited only that region.

Sarnia was the port with the second lowest level of "Lambton-Only" visitations (10.7%), followed by Rainy River (14.4%). Cornwall had the highest level of visitation (81.4%) of the region containing the Cornwall port of entry (Stormont, Dundas & Glengarry), while the Niagara and Windsor ports were somewhere in the middle of the distribution with 37% and 27.6% of "Niagara/Essex-Only" visitations, respectively.



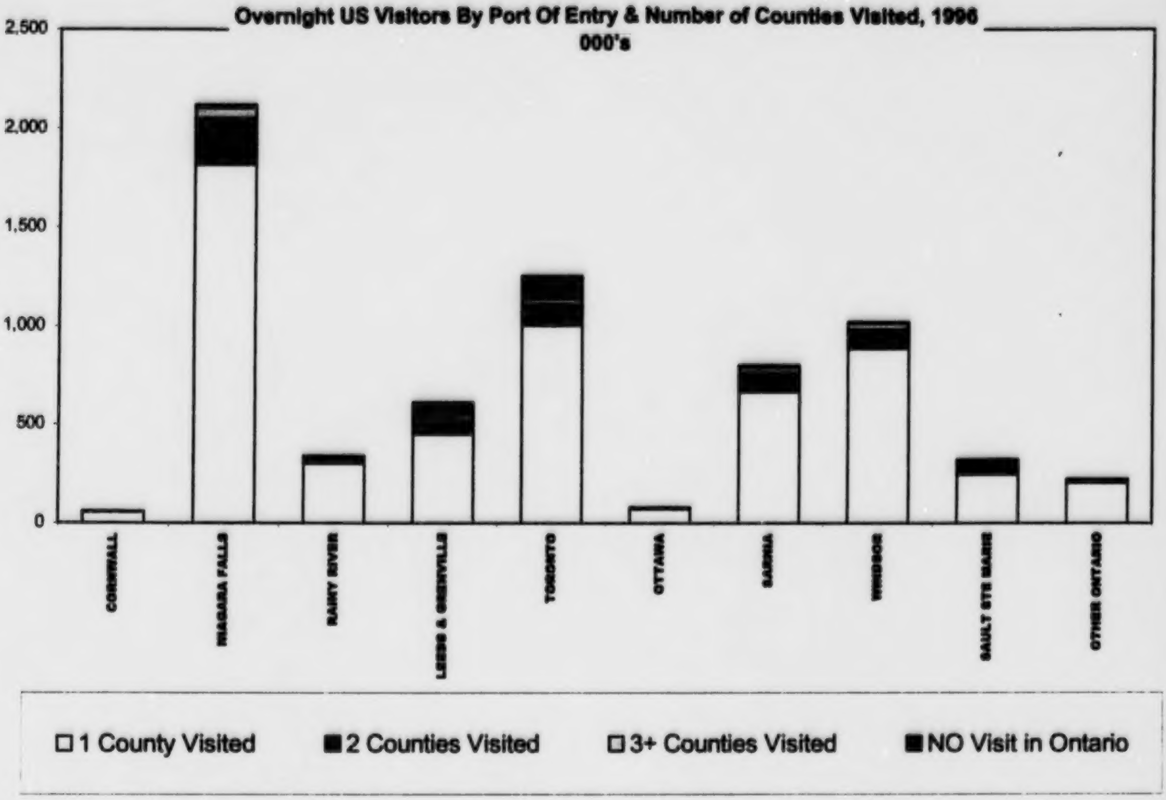
Of the provincially and regionally significant ports of entry, only Toronto and Sault Ste. Marie were destination regions for the Americans who entered Canada through these ports.

Since none of the provincially significant ports (Toronto, Niagara, Sarnia and Windsor) of entry was a destination and a significant generator of visits to other Ontario regions, then none of them was a gateway in 1996. At the regional level, only SS Marie was a regional gateway.

Of the provincially and regionally significant international ports of entry, Sault Ste. Marie had the best dispersion rate as the Americans who came to Canada through this port visited on average 1.27 Ontario counties, followed by Sarnia (1.18 counties), Windsor (1.16 counties), Niagara Falls (1.16 counties), Leeds & Grenville (1.09 counties), Rainy River (1.07 counties) and Toronto (1.04 counties).

The overwhelming majority of the US visitors who entered through the above-noted provincially and regionally significant ports visited only one county, with the percentages ranging from a low 73.6% for Leeds & Grenville, to 88.3% for Rainy River.

The southern ports of Toronto, Niagara Falls, Windsor, Sarnia and Leeds & Grenville accounted for 21.9% of the overnight US visitors who visited northern Ontario, while the northern ports did not contribute any significant flows to southern Ontario.



As far as the overnight US market is concerned, there does not appear to be any relationship between ports with high "dispersion rates" (i.e., average number of regions visited) and average length of stay or, at the regional level, between regional gateways/ports and average length of stay. The table below shows the average length of stay of the US visitors that went through the four provincially significant and the two regionally significant ports of entry. Toronto, which has the lowest dispersion rate among the provincially significant ports, has the highest average length of stay in Ontario, while Rainy River, which is not a regional gateway, has a higher average length of stay than SS Marie which is a regional gateway.

These observations seem to point out that for the overnight US visitors, it is the product that is being offered by the region containing the port of entry that is important in determining their average length of stay in Ontario. For example, Toronto has a more diverse product than, say, Sarnia, while Rainy River is a port of entry for the US visitors who go to Kenora and Rainy River for remote fishing and hunting. These visitors tend to have an average length of stay well over 6 nights (see Ontario's Remote Tourism Study, 1996).

Overnight US Visitors Entering Canada Through Ontario Ports							
Average Length Of Stay In Ontario (In Nights)							
All Ontario Ports	Niagara Falls	Rainy River	Leeds & Grenville	Toronto	Sarnia	Windsor	Sault Ste. Marie
3.12	2.61	5.19	3.75	3.23	2.72	3.10	3.31

However, when examining the relationship between the average length of stay and the number of regions visited by the overnight US visitors who went through a particular port, then we discover that there is a relationship between these two variables.

For example, of the overnight US visitors who came to Ontario in 1996 and visited only the region of the port of entry, the average length of stay in Ontario was 2.57 nights. Those who visited only one Ontario region, other than that of the port of entry, had an average of 3.11 nights, those who visited two counties had an average of 4.73 nights, those who visited three counties had an average of 6.9 nights and those who visited four or more counties had an average of 7.12 nights.

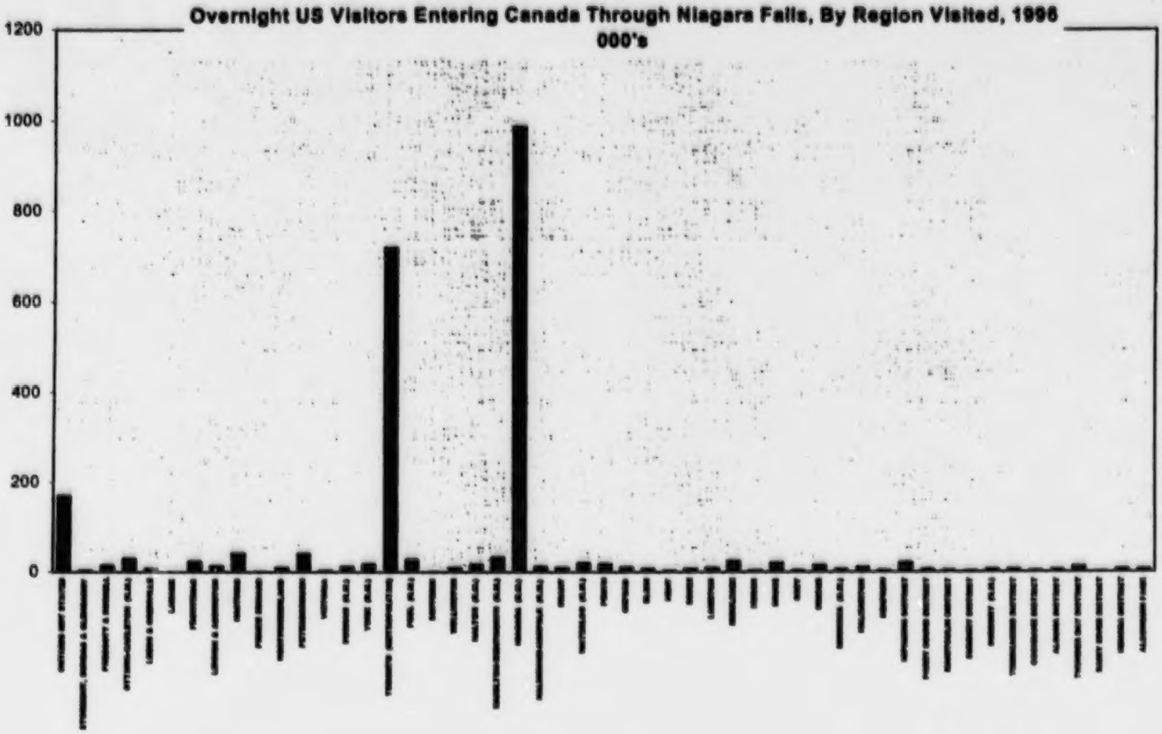
The same results are also observed for individual ports. For example, the table below shows the average lengths of stay and the number of regions visited for Toronto, Niagara Falls, Windsor and Sarnia, which are all provincially significant ports of entry. What these data show is that if, for example, the Americans who entered the province through Toronto and visited only Toronto/Peel (56.3%) could be made to visit one more region, their average length of stay could double.

Total Overnight - US	Port Of Entry Into Ontario			
	Toronto	Niagara Falls	Windsor	Sarnia
Number of Regions Visited	Average Length Of Stay In Ontario			
Only the region of the port of entry	2.84 nights	2.03 nights	1.64 nights	2.55 nights
One Ontario region- other than the port	3.24 nights	2.65 nights	3.17 nights	2.32 nights
Two Ontario regions	5.69 nights	3.84 nights	5.76 nights	4.74 nights
Three Ontario regions	7.53 nights	6.77 nights	7.84 nights	5.63 nights
Four or more Ontario regions	9.35 nights	5.26 nights	7.61 nights	7.17 nights

Niagara Falls Of the overnight US visitors who entered Canada via the Niagara ports of entry (2.118 million), 46.6% visited the Niagara region for one or more nights and 34.0% visited Toronto for an overnight stay. Of those that visited Toronto, 78.8% (or 26.8% of the total overnight US visitors who entered through Niagara) visited only Toronto and no other Ontario region. The remaining regions received minimal levels of visitation (Hastings and Peterborough were third each attracting 1.9% of these visitors). Those who stayed for one or more nights in Niagara accounted for 75.8% of the region's total overnight US visitors.

Although Niagara Falls has a good dispersion rate (63.0% of those who entered Canada via the Niagara ports also visited other Ontario regions), the Niagara region is not an international gateway for the overnight US visitors who entered Canada through its ports because the region is not at the same time a very strong destination region (only 46.6% of the US visitors who entered Canada through Niagara Falls also visited the Niagara regions).

Of the total overnight visits in Ontario generated by the US visitors who entered Canada through Niagara ports (2.449 million), 44.5% occurred in the region formed by Niagara RM and its surrounding counties (a total of 7 counties stretching from Haldimand in the west to Waterloo and Wellington in the north to Halton in the east). As such, this region is not a very important destination area for the overnight US visitors who entered Canada through Niagara Falls.



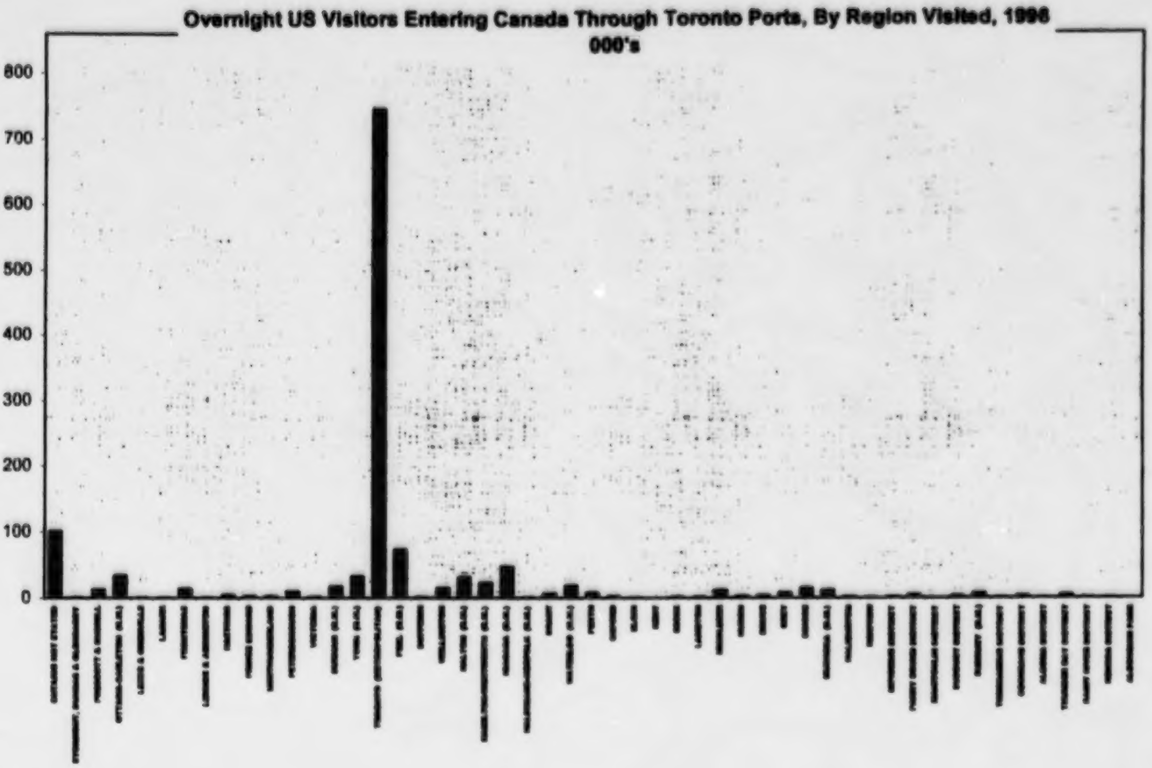
The farthest region visited was Kenora attracting 6,000 of these visitors, or 0.3%. Northern Ontario as a whole received 78,000 of these visitors or 3.7%. Although these visitors account for a small percentage of those who entered Niagara Falls, they nevertheless accounted for 8.1% of northern Ontario's total overnight visitors from the US.

Metropolitan Toronto Of the overnight US visitors who entered Canada through the Toronto ports (1.255 million through the four airports and one seaport), 59.4% visited Toronto for one or more nights, 5.9% visited Peel and 3.7% the Niagara region.

Since only 48.9% of the overnight US visitors who entered Canada through the Toronto ports visited other Ontario regions, Toronto is not only an international gateway for these visitors, but it is a destination region. Those who stayed for one or more nights in Toronto, accounted for 35.7% of the region's total overnight US visitors.

Of the total overnight visits in Ontario generated by the US visitors who entered Canada through the Toronto ports (1.311 million), 66.4% stayed for one or more nights in the region formed by Toronto, Peel, York and Durham. Since adding more of its neighbouring counties does not improve the share of visitation substantially, this observation reinforces the conclusion that Toronto is a destination region on its own as far as these visitors are concerned.

Kenora was the farthest region reached by these visitors (1,000 or 0.1%), while the north as a whole received 29,000 (or 2.3%) of them. The corridor formed by Toronto, Peel, Halton, Hamilton and Niagara received 70.3% of the total visits.



Windsor Of the overnight US visitors who entered Canada through the Windsor ports (1.023 million), 30.3% visited Essex for one or more nights, 29.6% stayed in Toronto (22.8% stayed only in Toronto), 10.8% stayed in Niagara and 5.5% stayed in Kent county. Those who stayed in Essex for one or more nights accounted for 86.4% of the total overnight US visitors to the county.

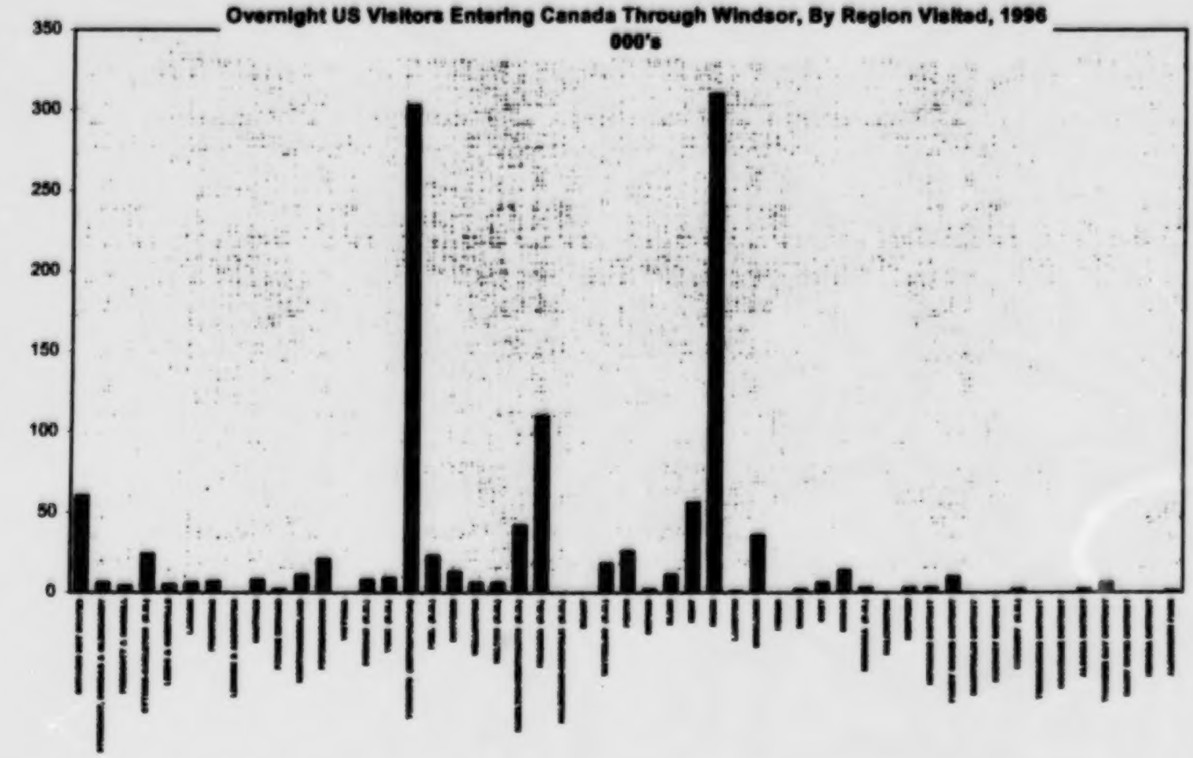
Although 72.4% of the overnight US visitors who entered Canada through the Windsor ports also visited other Ontario regions, Windsor is not an international gateway for these visitors because it is not at the same time an important destination area for those who entered through its ports.

The region formed by Essex, Kent, Elgin, Middlesex and Lambton received 34.8% of the total visits in Ontario (1.19 million) generated by the overnight US visitors who entered Canada through Windsor. As such neither Essex nor the region formed by it and its neighbours is a very important destination area for the overnight US visitors that entered through Windsor.
The Thunder Bay district was the farthest region reached by 6,000 (or 0.6%) of these visitors.

Sarnia Of the overnight US visitors who entered Canada through Sarnia (803,000), 13.2% stayed in Lambton for one or more nights, 23.3% stayed in Toronto (17.1% stayed only in Toronto), 14.6% stayed in Perth, 13.2% stayed in Niagara and 7.6% stayed in Middlesex. Those visitors who stayed in Lambton for one or more nights accounted for 85.5% of the total overnight US visitors to the county.

Although 86.8% of the overnight US visitors who entered Canada through Sarnia also visited other Ontario regions, Sarnia is not an international gateway to Ontario for these visitors, because it is not a significant destination region (only 13.2% of these visitors visited the Lambton region).
The region formed by Lambton, Essex, Kent, Elgin, Middlesex, Perth, Oxford and Huron received 36.2% of

the total visits (947,000) in Ontario generated by the overnight US visitors who entered Canada through Sarnia. As such, even with its neighbouring counties Lambton does not form a significant destination region for the Americans who entered through its ports.



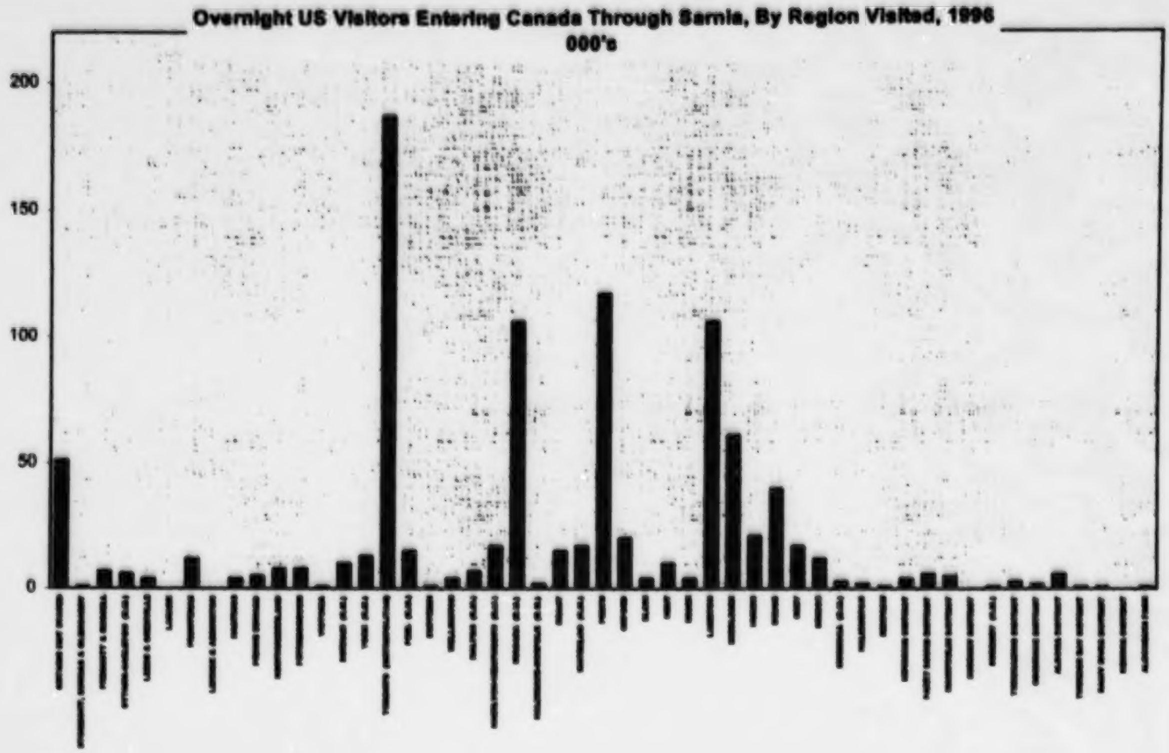
The Rainy River district was the farthest region reached by 1,000 (or 0.1%) of these visitors.

Leeds & Grenville Of the overnight US visitors who entered Canada through the Leeds & Grenville ports of entry (611,000), 25.2% visited the county for one or more nights, 21.6% visited Ottawa-Carleton, 14.4% visited Frontenac, 6.5% Toronto and 8.3% Northern Ontario. Those who stayed in Leeds & Grenville for one or more nights accounted for 82.4% of the total overnight US visitors to the county.

Although 79.7% of the overnight US visitors who entered Canada through the Leeds & Grenville ports also visited other Ontario regions, Leeds & Grenville is not a regional gateway for these visitors, because it is not at the same time a very important destination region.

The region that is formed by Leeds & Grenville and its surrounding counties (a total of seven counties stretching from Lennox & Addington in the west to Stormont, Dundas & Glengarry in the east to Lanark in the north) received 62.4% of the overnight visits generated by the US visitors entering Canada through Leeds & Grenville ports (a total of 668,000). As such, this region is an important destination region for the Americans who entered through Leeds & Grenville.

Kenora was the farthest region reached by 1,000 of these travellers, or 0.2% of the Americans who entered Canada through Leeds & Grenville.


Overnight US Visitors Entering Canada Through Sarnia, By Region Visited, 1996
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Sault Ste. Marie Of the overnight US visitors who entered Canada through Sault Ste. Marie (321,000), 57.0% stayed in the Algoma district for one or more nights, 8.1% stayed in Toronto, 6.9% stayed in Ottawa-Carleton, 6.5% stayed in Grey county and 6.2% stayed in the Sudbury district (excluding Sudbury RM). Those who stayed in Algoma for one or more nights accounted for 76.9% of the total overnight US visitors to the district.

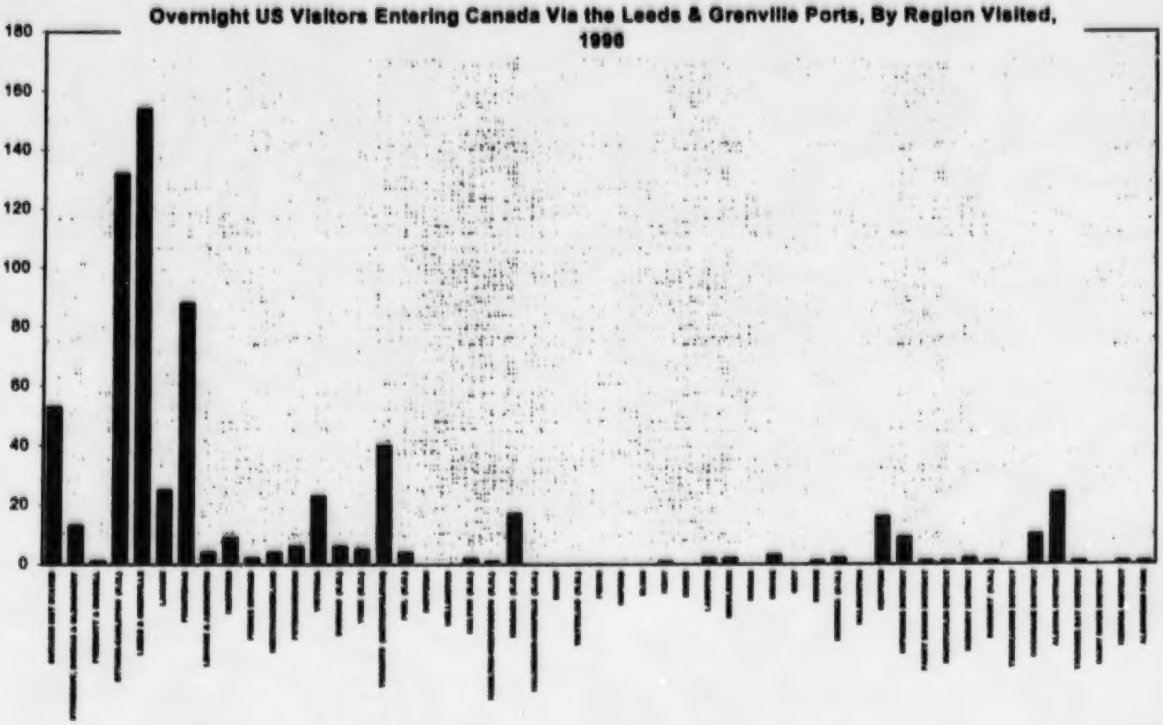
Since 52.0% of the overnight US visitors who entered Canada through Sault Ste. Marie visited other Ontario regions, the area is a regional gateway for these visitors.

The region formed by Algoma, Sudbury district, Sudbury RM and Manitoulin received 53.1% of the total visits (407,000) generated by the overnight US visitors entering Canada through Sault Ste. Marie, indicating again that Algoma is a stand alone destination region for the overnight US visitor that entered Canada through Sault Ste. Marie.

Rainy River Of the overnight US visitors who entered Canada through the Rainy River ports of entry (341,000), 50.1% stayed for one or more nights in the Kenora District, 18.2% in the Rainy River District and 15.5% in the Thunder Bay District. All other Ontario regions received minimal levels of visitation. Those who stayed for one or more nights in Rainy River accounted for 89.9% of the total overnight US visitors to the district.

Although 85.6% of the overnight US visitors who entered Canada through the Rainy River ports visited other Ontario regions, Rainy River is not a regional gateway, because it is not an important destination region for these visitors.

The region formed by Rainy River, Kenora and Thunder Bay, received 77.5% of the total visits (369,000) of the overnight US visitors that entered Canada through the Rainy River ports. As such, this region is a significant destination area for the overnight US visitors who entered Canada through the Rainy River ports of entry.



Overnight US Visitors Entering Canada Via the Leeds & Grenville Ports, By Region Visited, 1996

Conclusions:

- There were four provincially significant (Niagara, Toronto, Windsor and Sarnia) and three regionally significant (Leeds & Grenville, Sault Ste. Marie and Rainy River) international ports of entry in Ontario, accounting for 95.3% of the overnight US visitors that visited Ontario in 1996.

- The overwhelming majority (ranging from 73.6% to 88.3%) of overnight US visitors who come to Ontario through these provincially and regionally significant ports visited only one county/municipality/district.

- With the exception of Toronto, the overnight US visitors who entered Canada through the remaining three provincially significant and three regionally significant ports accounted for the majority of the total overnight US visits to the counties/districts containing these ports. In Toronto, they accounted only for 35.7% of its total overnight US visitors, indicating that the majority of the US visitors to Toronto enter the province through a port other than Toronto.

- OTAP 2 is not a significant destination region for the overnight US visitors who entered Ontario through the Niagara ports.

- OTAP 1 is not a significant destination region for the overnight US visitors who entered Ontario through Windsor or Sarnia.

	OVERNIGHT US VISITORS, 1996			
Name Of Port	**Significant Port?**	**Significant Visits To Other Ontario Regions?**	**Significant Destination?**	**Gateway?**
Niagara	**Yes** (31.2% of Ontario's overnight US visitors)	Yes (63.0% visited other regions)	No (46.6% visited Niagara region)	No
Toronto	**Yes** (18.4% of Ontario's overnight US visitors)	No (only 43.7% visited other regions)	Yes (59.4% visited Toronto and 64.6% visited Toronto-Peel)	No
Windsor	**Yes** (15.1% of Ontario's overnight US visitors)	Yes (72.4% visited other regions)	No (30.3% visited the Essex)	No
Sarnia	**Yes** (11.8% of Ontario's overnight US visitors)	Yes (89.3% visited other regions)	No (13.2% visited Lambton)	No
Leeds & Grenville	**Regionally** (9.0% of Ontario's overnight US visitors, but 49.7% for eastern Ontario)	Yes (79.7% visited other regions)	No (25.2% visited the region)	No
S.S. Marie	**Regionally** (33.2% of the North's overnight US visitors)	Yes (52.0% visited other regions)	Yes (57.0% visited Algoma)	Regional
Rainy River	**Regionally** (35.2% of the north's overnight US visitors)	Yes (85.6% visited other regions)	No (18.2% visited the region)	No

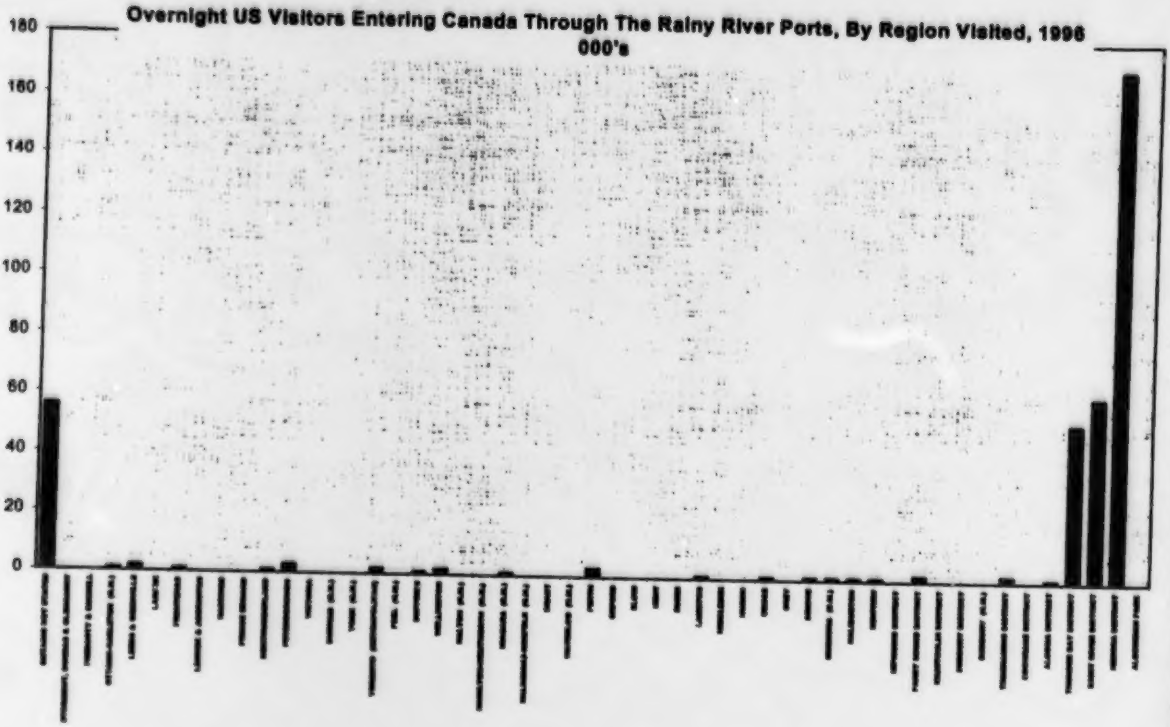
- The region stretching from Lennox & Addington, to Lanark, to the Quebec border is a significant destination region for the overnight US visitors who entered Ontario through Leeds & Grenville.

- Toronto is an important destination region for the overnight US visitors who entered Ontario through Niagara, Windsor and Sarnia. However, the reverse is not true. For example, 34.0% of the overnight US visitors who entered Niagara, visited Toronto, while only 3.7% of those who entered Ontario through Toronto visited Niagara.

- The southern ports of Niagara (especially Niagara), Toronto, Windsor, Sarnia and Leeds & Grenville accounted for 21.9% of the overnight US visitors to Northern Ontario.

- For any given Ontario port, there is a positive relationship between the US visitors' length of stay in Ontario and the number of regions visited. That is, the more regions they visited, the longer they stayed.

- US overnight visitors who entered Canada through Toronto had the highest average length of stay in Ontario.



Overnight US Visitors Entering Canada Through The Rainy River Ports, By Region Visited, 1996
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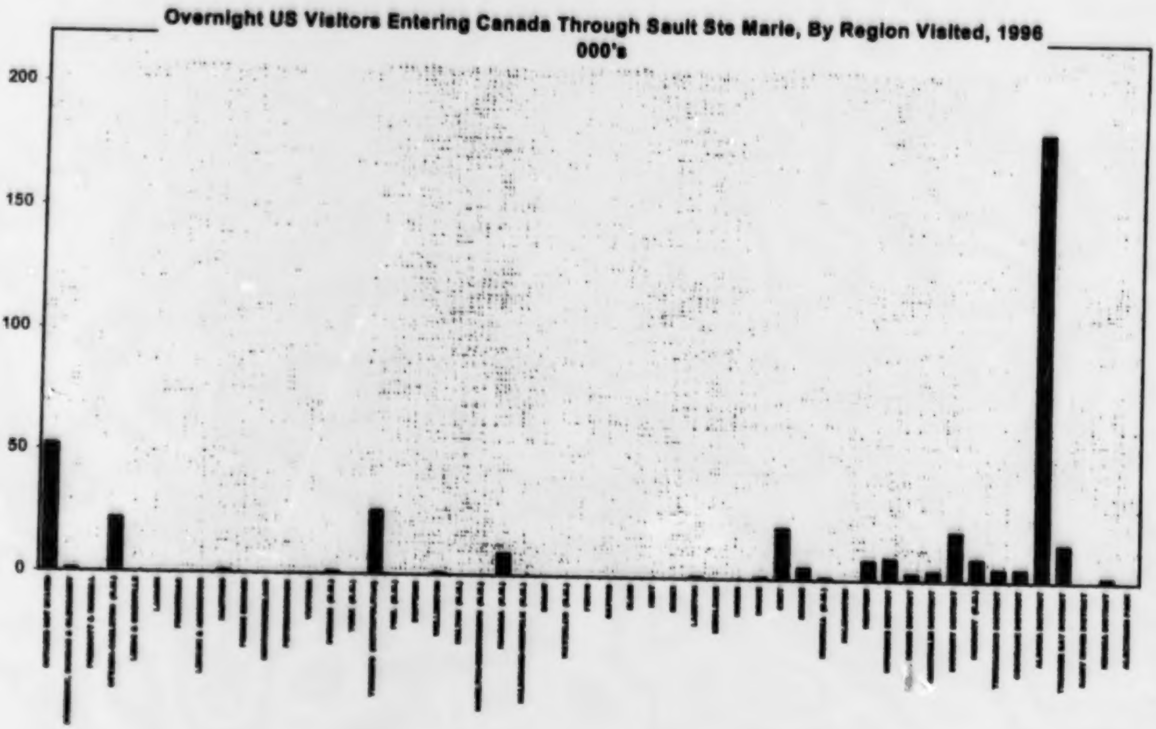

Overnight US Visitors Entering Canada Through Sault Ste Marie, By Region Visited, 1996
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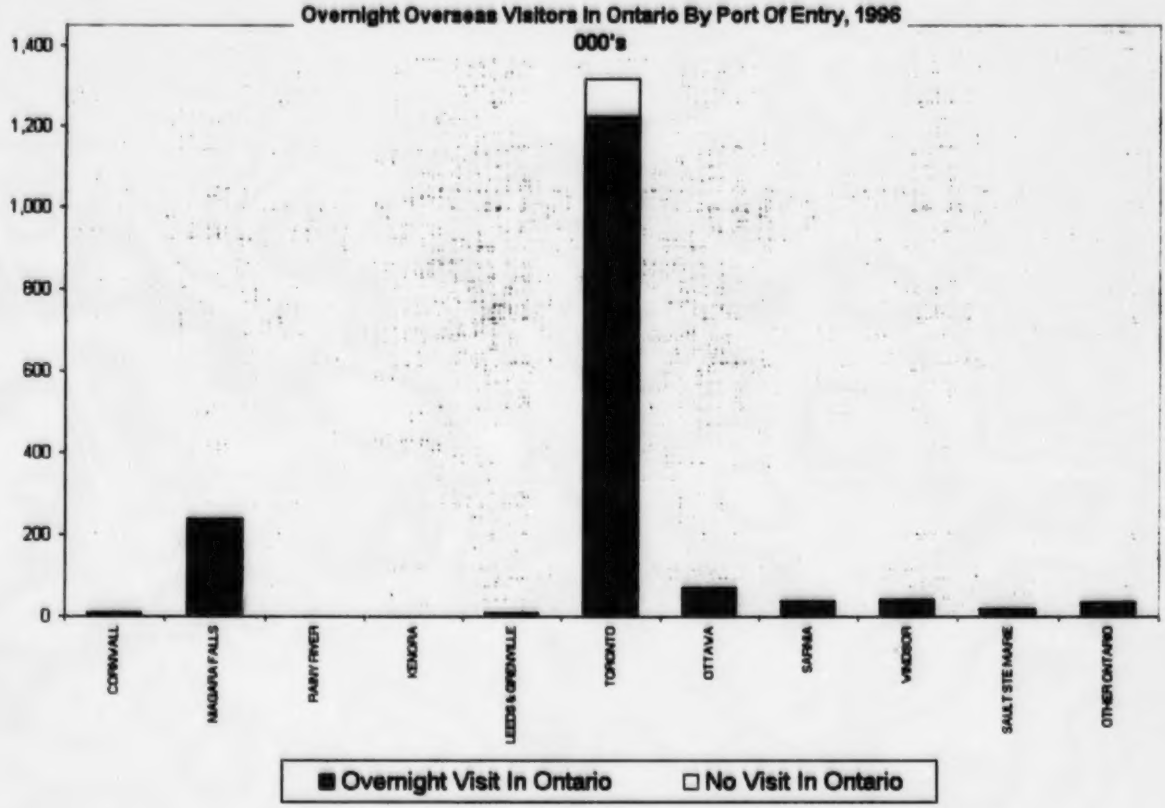
B.2.2. The Overnight Overseas Market

A total of 1,782,000 overnight overseas visitors entered Canada through Ontario's international ports in 1996. Of those, 5.8% did not visit any Ontario region and 94.2% did. In addition, 510,000, or 23.3% of the total overnight overseas visitors to Ontario, entered Canada through a non-Ontario port.
The Toronto ports processed most of the Ontario entries (73.9%), followed by Niagara Falls (13.4%), and Ottawa (4.0%).

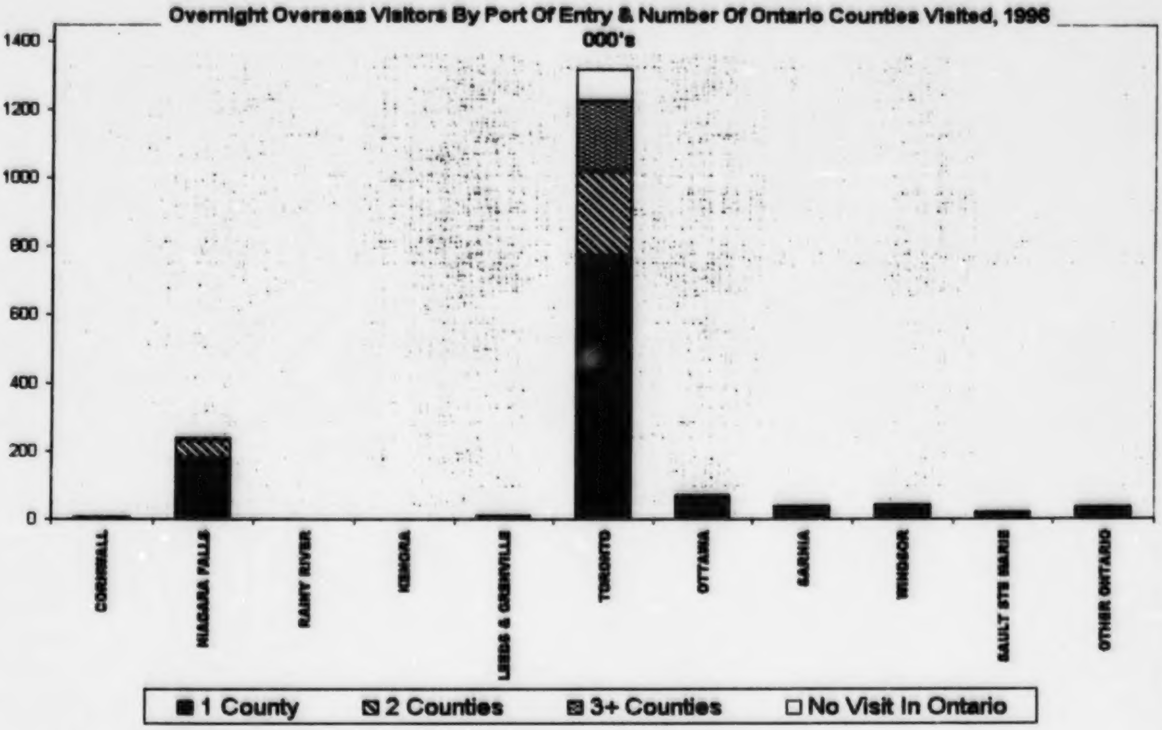


Of the overnight overseas visitors who visited Ontario, but entered Canada through a non-Ontario port, 68.8% entered Canada through Quebec, 25.3% through BC and 2.4% through Nova Scotia.

Of those who visited Ontario, but entered Canada through a non-Ontario port, and had a known mode of transport within Canada (420,000), 61.7% came to the province through the region formed by Prescott & Russell and Stormont, Dundas & Glengarry, with the latter being the most likely port of entry since it contains Highway 401. Of the remaining, 29.3% came to Ontario through Toronto, 2.4% through Kenora and 6.7% through an indeterminate, but western, provincial point of entry. As such, Toronto was the point of entry into the province for 1.466 million of overnight overseas visitors, 1.37 million of which (representing 62.6% of Ontario's total overnight overseas visitors) visited Ontario in 1996.

Of Ontario's main overseas travel markets, France had the lowest share of Ontario visitors entering Canada through an Ontario port (only 41.3% of the total overnight French visitors to Ontario entered Canada through a provincial port) and UK the highest (92.6%). Germany had the second highest share (91.4%),

followed by South Korea (84.6%), Japan (84.5%) and Hong Kong (78.8%).
Almost all of the French visitors to Ontario who entered Canada through a non-Ontario port, they did so through Quebec (117,000 out of 118,000). Of the East Asian visitors who visited Ontario, but entered Canada through a non-Ontario port (120,000), 85% did so through BC.



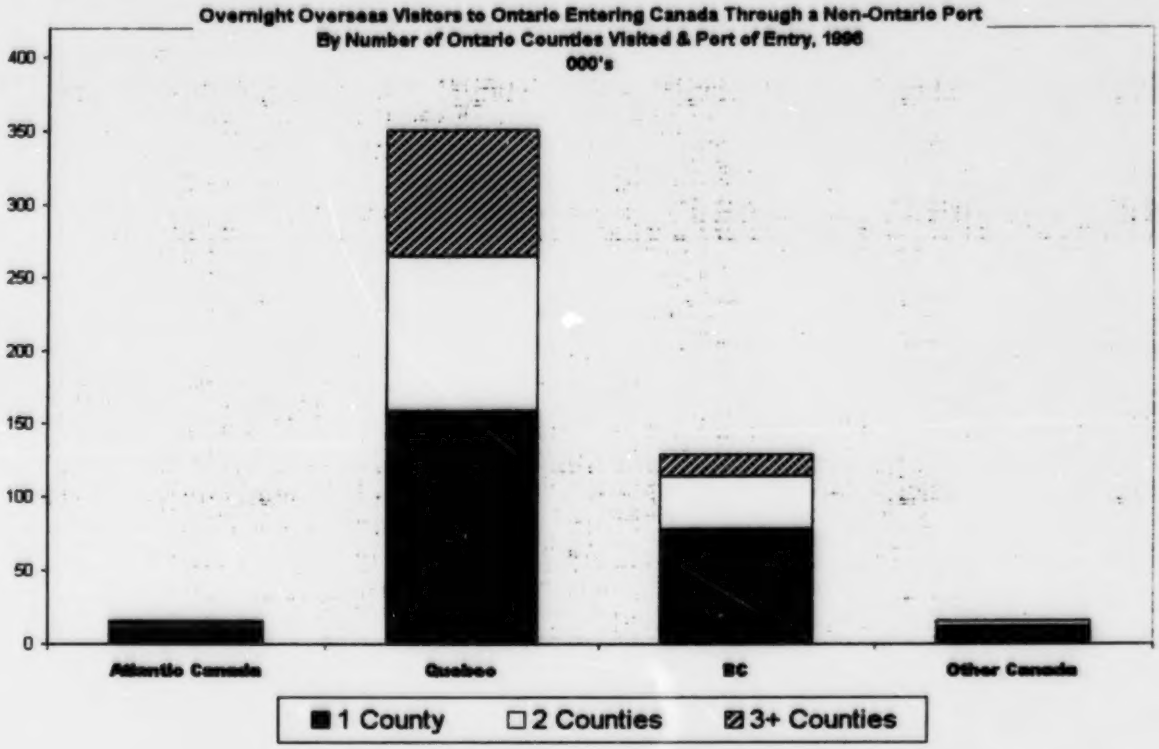
Although Niagara Falls processed 13.4% of the overnight overseas visitors who entered Canada through the Ontario ports, it processed 59.7% of the South Korean overnight visitors who entered Canada through Ontario, 56.0% of the Japanese visitors and 17.1% of the Hong Kong visitors. These three countries accounted for 45.0% of the overnight overseas visitors who entered Canada through Niagara Falls. This higher share of east Asian visitors entering Canada through Niagara is due to the fact that many of these visitors came to Canada via the US. The table below presents a summary of selected overnight overseas markets who had a visit in Ontario and their ports of entry into Canada.

The majority of the overseas visitors who entered Canada through an Ontario port and had no visit in Ontario (92.3%) did so through Toronto's ports, followed by Niagara Falls (3.8%). In total 104,000 overseas visitors on an overnight trip entered Canada through Ontario ports and did not visit any Ontario region.

There are only two provincially significant ports of entry for overnight overseas visitors to Ontario who entered Canada through an Ontario port: Toronto and Niagara Falls. Both of these ports are international gateways to Ontario since they are both destination regions and the share of overseas visitors who visited only the region of entry was 34.8% for Toronto/Peel and 49.2% for Niagara.

In addition, for the overseas visitors who entered Canada through a non-Ontario port, the region formed by Prescott & Russell and Stormont, Dundas & Glengarry (PRSDG) is a provincially significant port, but not an international gateway since only 3.9% of the visitors who entered through that region also visited it. As such, even if all the overnight overseas visitors who visited PRSDG did not visit any other Ontario regions, it would not qualify for an international gateway.

Toronto had a better dispersion rate than Niagara Falls as the overseas visitors who came to Canada through it visited on average 1.97 counties as opposed to 1.29 for those who came through the Niagara ports. Those who visited Ontario but entered Canada through Quebec had the highest dispersion rate (2.14 counties visited), while those who entered Canada through BC had an average dispersion rate of 1.61 counties visited.



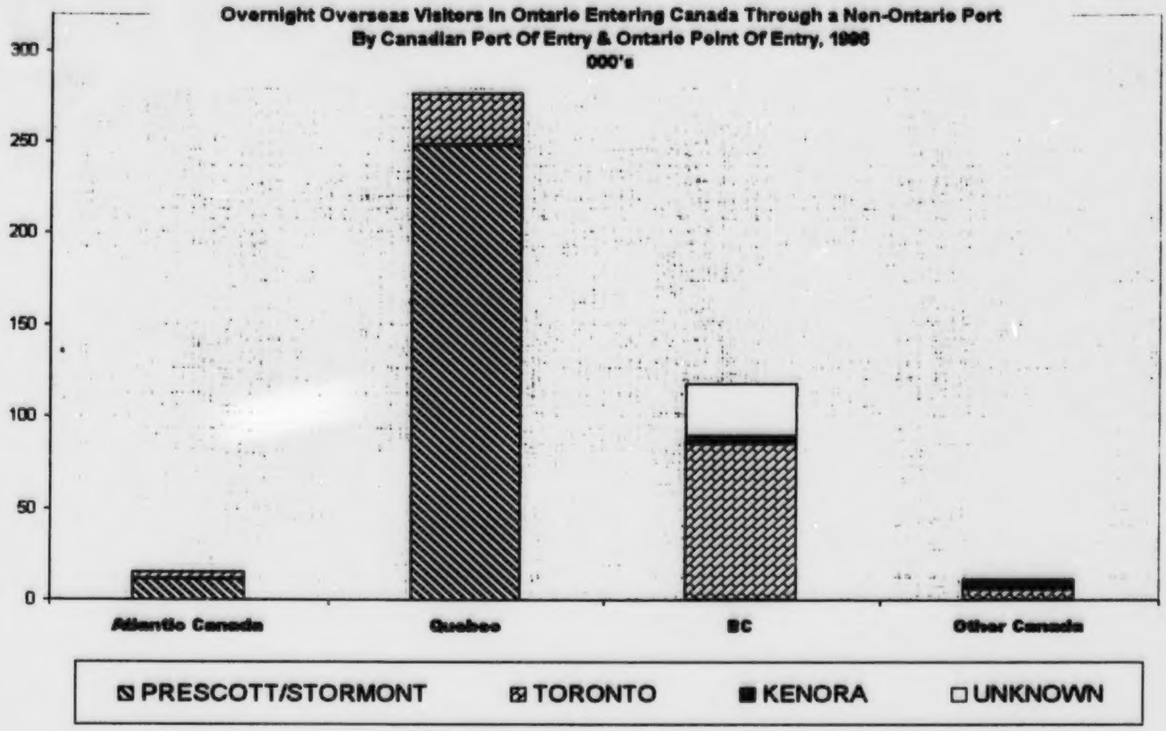
The majority (75.5%) of the overnight overseas visitors who came to Canada through Niagara visited one Ontario region and 21.1% visited two regions. In comparison, 58.5% of those who came to Canada through the Toronto ports visited one region only, 18.7% visited two regions and 15.5% visited 3 or more regions. Of those who visited Ontario, but entered Canada through Quebec, 44.9% visited one Ontario county, 30.6% visited two counties and 24.5% visited three or more counties, while for those who entered Canada through BC, 59.6% visited one Ontario county, 28.6% visited two counties and 11.7% visited three or more Ontario counties.

As was the case with the overnight US market, there does not appear to be a strong relationship between ports with high "dispersion rates" (i.e., number of regions visited) and average length of stay in Ontario. Leeds & Grenville had the highest dispersion rate among Ontario's international ports of entry, but the overseas visitors who entered Canada through its ports had the 7th highest average length of stay in Ontario (4.03 nights). Further, there does not seem to be a relationship between gateways/non-gateways and average length of stay. For example, Toronto had the second highest average length of stay in Ontario (9.87 nights), after Rainy River (15.99 nights), but Niagara Falls had the second lowest (3.08 nights).

	Total Overnight Visits In Ontario	Port of Entry Into Canada, 1996					
Origin Of Visitors		**Toronto**	**Niagara Falls**	**Quebec**	**BC**	**Other Ontario**	**Other Canada**
UK	380,000 (100.0%)	291,000 (76.6%)	9,000 (2.4%)	40,000 (10.5%)	4,000 (1.1%)	30,000 (7.9%)	6,000 (1.6%)
France	184,000 (100.0%)	56,000 (30.4%)	5,000 (2.7%)	117,000 (63.6%)	1,000 (0.5%)	5,000 (2.7%)	0 (0.0%)
Germany	209,000 (100.0%)	150,000 (71.8%)	7,000 (3.3%)	27,000 (12.9%)	2,000 (1.0%)	18,000 (8.6%)	5,000 (2.4%)
Other Europe	364,000 (100.0%)	219,000 (60.2%)	19,000 (5.2%)	78,000 (21.4%)	4,000 (1.1%)	31,000 (8.5%)	13,000 (3.6%)
Japan	277,000 (100.0%)	100,000 (36.1%)	78,000 (28.2%)	8,000 (2.9%)	39,000 (14.1%)	50,000 (18.1%)	2,000 (0.7%)
Other East Asia	343,000 (100.0%)	153,000 (44.6%)	64,000 (18.7%)	7,000 (2.0%)	63,000 (18.4%)	55,000 (16.0%)	1,000 (0.3%)
Caribbean	72,000 (100.0%)	59,000 (81.9%)	3,000 (4.2%)	2,000 (2.8%)	0 (0.0%)	7,000 (9.7%)	1,000 (1.4%)
Oceania	84,000 (100.0%)	50,000 (59.5%)	3,000 (3.6%)	12,000 (14.3%)	11,000 (13.1%)	6,000 (7.1%)	2,000 (2.4%)
Central & South America	125,000 (100.0%)	74,000 (59.2%)	8,000 (6.4%)	30,000 (24.0%)	0 (0.0%)	12,000 (9.6%)	1,000 (0.8%)

However, when looking only at those who went through a particular port, then the same relationship that was observed earlier in the US market is also present here. That is, as the table below shows, the more regions an overseas visitor visits, the higher the average length of stay in Ontario.

Total Overnight - Overseas	Port Of Entry Into Ontario		
	All Ontario Ports	Toronto	Niagara Falls
Number of Regions Visited	Average Length Of Stay In Ontario		
Only the region of the port of entry	4.00 nights	9.83 nights	2.22 nights
One Ontario region- other than the port	8.44 nights	9.38 nights	3.33 nights
Two Ontario regions	9.40 nights	10.85 nights	4.68 nights
Three Ontario regions	13.19 nights	14.04 nights	7.46 nights
Four or more Ontario regions	16.57 nights	16.86 nights	-


Overnight Overseas Visitors In Ontario Entering Canada Through a Non-Ontario Port
By Canadian Port Of Entry & Ontario Point Of Entry, 1996
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Metro Toronto Of the overnight overseas visitors who entered Canada through the Toronto ports (1.317 million), 57.2% visited Toronto for one or more nights, 16.6% visited Niagara, 13.4% visited Ottawa, 5.7% visited Peel, 4.3% visited Frontenac, 3.3% visited Simcoe county, 2.7% visited Waterloo and 2.7% visited York. Kenora was the farthest region visited by these visitors (1,000).

Although nearly every Ontario county/district was visited by these overseas visitors, the visitation levels to the remaining counties/districts were minimal.

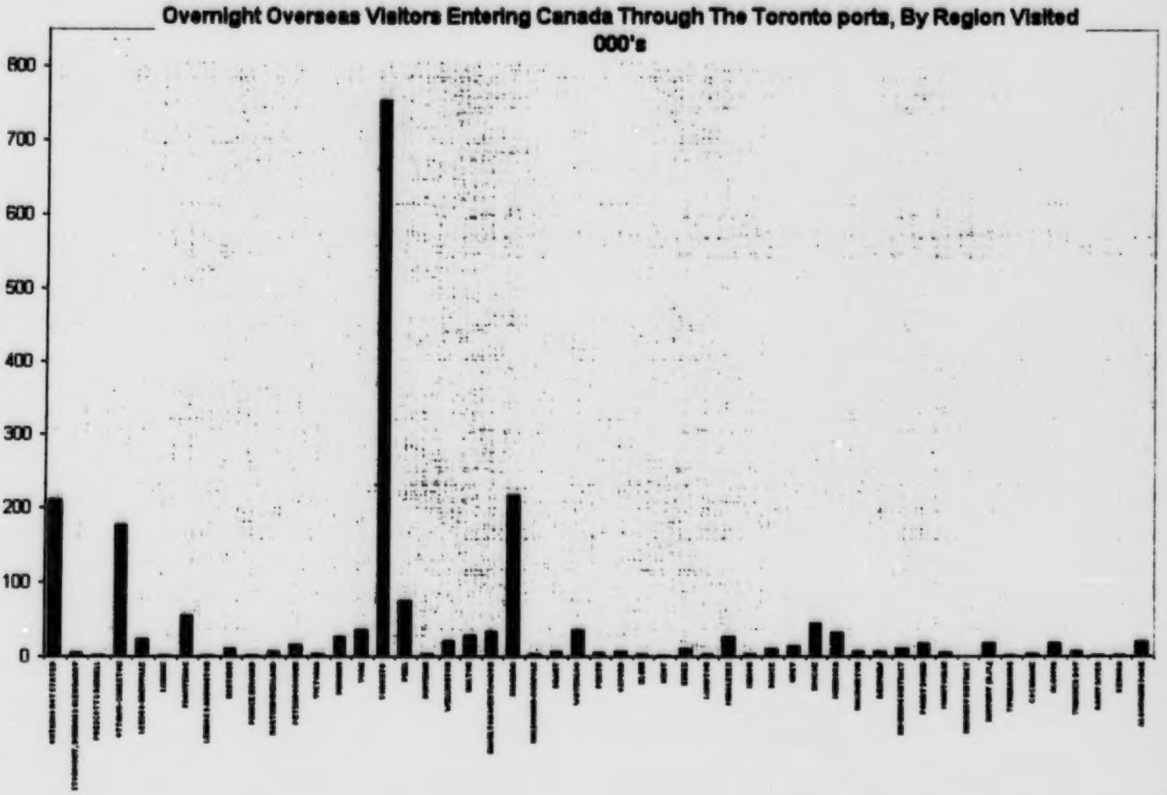
The overnight overseas visitors who came to Canada through the Toronto ports and visited northern Ontario accounted for 60.4% of northern Ontario's overnight overseas visitors, those who visited Metro, for 60.0% of Toronto's total overnight overseas visitors and those who visited Niagara for 36.3% of Niagara's total overnight overseas visitors.

Since 65.2% of those who entered Canada through the Toronto ports visited other Ontario regions and since 57.2% also visited Toronto, the region is an international gateway to Ontario for the province's overseas visitors.

Niagara Of the overnight overseas visitors who entered Canada through the Niagara ports (238,000), 68.1% visited the Niagara region, 35.7% visited Toronto, and 4.2% visited Ottawa-Carleton. The remaining Ontario regions received minimal visitation levels. Simcoe county was as far north as these visitors travelled in Ontario (1,000 of them).

The overnight overseas visitors who entered Canada through the Niagara ports and visited the Niagara area accounted only for 27.0% of the region's total overnight overseas visitors.

Since 50.8% of the overseas visitors who entered Canada through the Niagara ports visited other Ontario regions and since 68.1% of these same visitors visited the Niagara region, these ports constitute an international gateway to Ontario for overseas visitors.



Overnight Overseas Visitors Entering Canada Through The Toronto ports, By Region Visited
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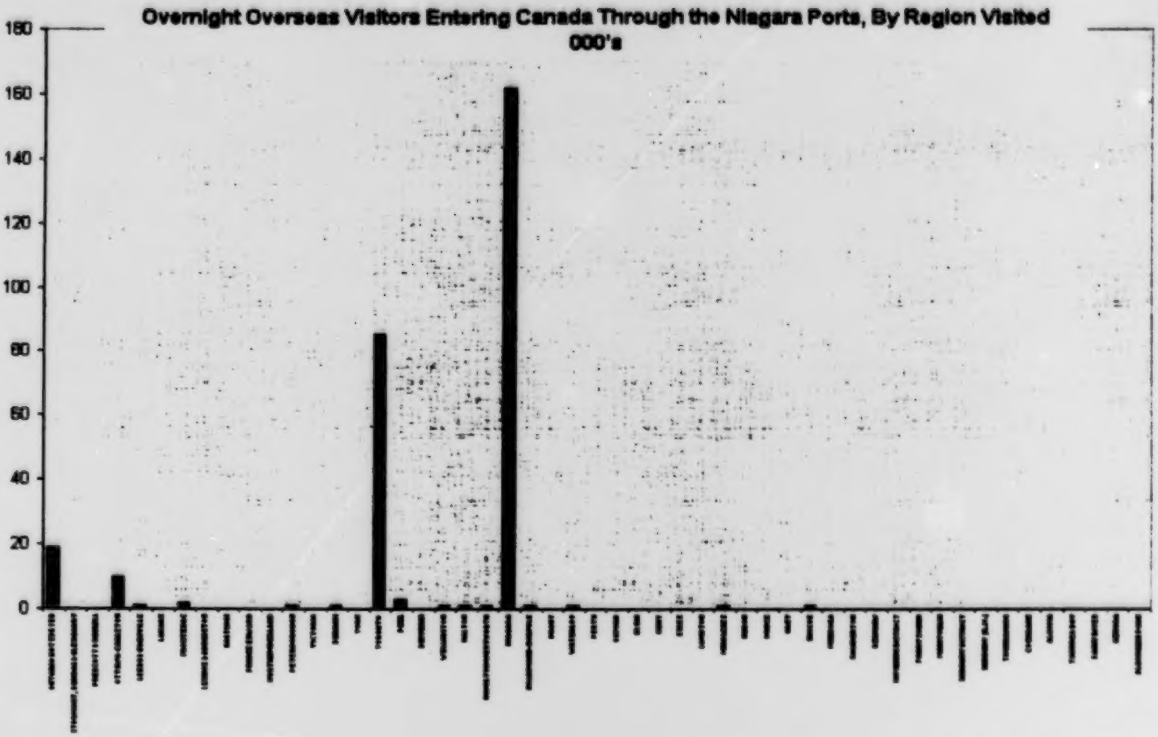
Quebec Of the overnight overseas visitors who visited Ontario but entered Canada through Quebec (351,000), 52.5% visited Ottawa-Carleton, 67.8% visited Toronto and 39.6% visited Niagara. The remaining Ontario regions received minimal visitation levels. Algoma and Essex were the farthest places in Ontario visited by these visitors (1,000 and 2,000, respectively).

These visitors accounted for 39.5% of Ottawa-Carleton's total overnight overseas visitors, 19.0% of Toronto's and 23.2% of Niagara's.
Only 9,000 of these visitors (or 2.6%) visited the Ontario region of entry (the region formed by Prescott & Russell and Stormont Dundas & Glengarry), indicating that this region is not a gateway for these visitors.

BC Of the overnight overseas visitors who visited Ontario but entered Canada through BC (129,000), 15.9% visited Ottawa-Carleton, 82.6% visited Toronto and 26.7% visited the Niagara region. The remaining Ontario regions received minimal visitation levels. These visitors accounted for 4.5% of the total overnight overseas visitors to Ottawa-Carleton, 8.4% of Toronto's and 5.7% of Niagara's.

Of the overnight overseas visitors who entered Canada through BC and visited Toronto and had a known transportation mode within Canada, 72.0% came to Ontario through Toronto. Of those who visited Toronto (106,000), 63,000 (or 59.4%) visited only Toronto and no other Ontario region. As such, although Toronto is a destination region for these visitors, it is not at the same time a provincial gateway.


Overnight Overseas Visitors Entering Canada Through the Niagara Ports, By Region Visited
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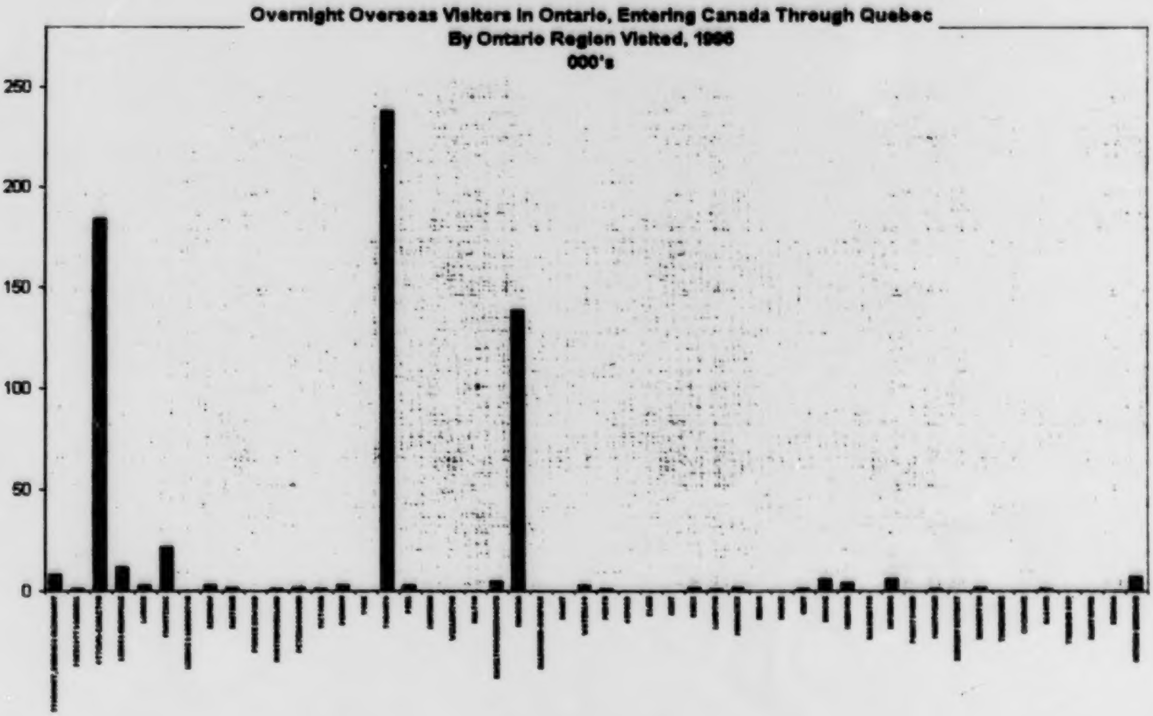
Overnight Overseas Visitors in Ontario, Entering Canada Through Quebec
By Ontario Region Visited, 1996
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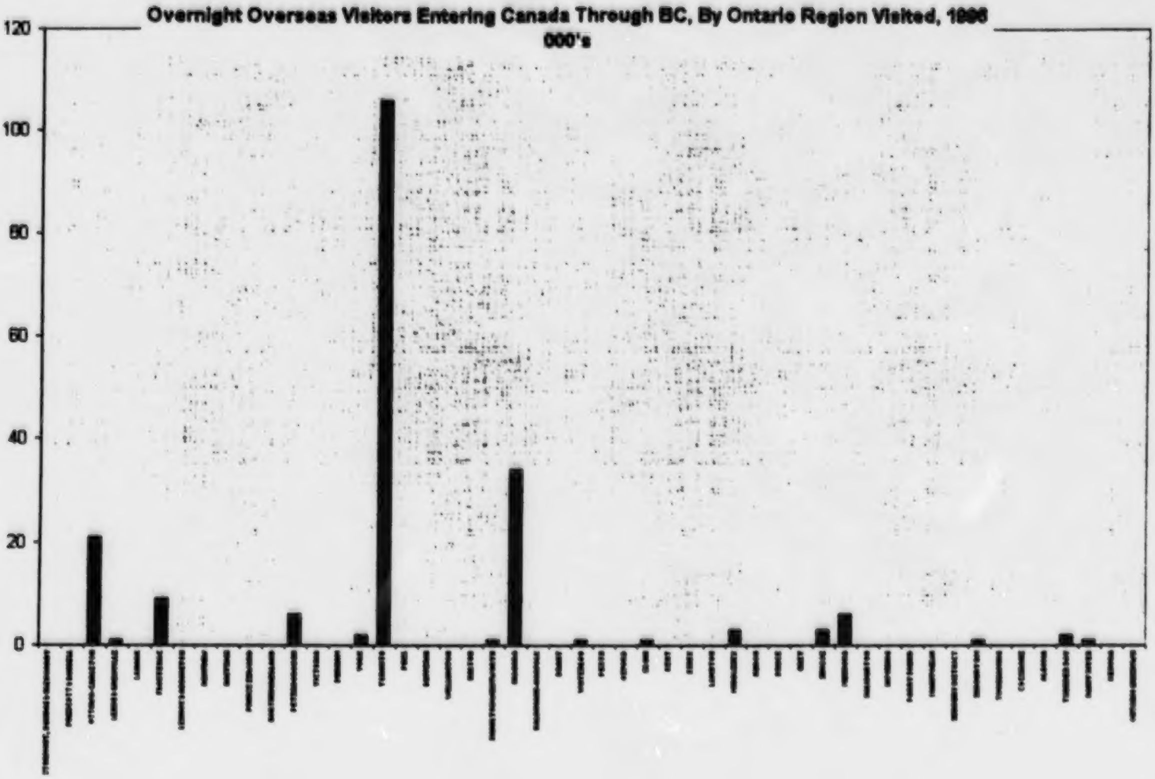


Conclusions:

- The overnight overseas visitors who entered Canada through Ontario's ports and visited Ontario accounted for 76.7% of the overnight visitors to Ontario from overseas countries.

- Of the remaining (23.3%) overnight overseas visitors who visited Ontario, 16.0% entered Canada through Quebec, 5.9% through BC and 1.4% through other provinces.

- 5.8%, or 104,000, of the overnight overseas visitors who entered Canada through Ontario ports did not visit any provincial region.

- For the overnight overseas visitors who entered Canada through Ontario, there were only two provincially significant ports, Toronto and Niagara accounting for 87.3% of these visitors.

- The overseas visitors who entered Canada through Toronto and Niagara Falls and visited Ontario accounted for 66.5% of the province's total overnight overseas visitors.

- For the overnight overseas visitors who visited Ontario but entered Canada through another province, the region formed by Prescott & Russell and Stormont, Dundas & Glengarry was a major gateway to Ontario, followed by Toronto.

- The majority of the overseas visitors (62.5% overall) who entered Canada through Ontario's ports visited only one county/district in 1996. On average these visitors visited 1.48 Ontario counties, while those who had a visit in the province visited on average 1.58 counties. In contrast, the overnight US visitors who entered Canada through the Ontario ports visited on average 1.13 counties, while those with a visit in the province visited on average 1.17 counties.

	Significant Port?	Significant Visits To Other Ontario Regions?	Significant Destination?	Gateway to Ontario?
Overnight Overseas Visitors Entering Canada Through Ontario Ports				
Toronto	Yes (processed 73.9% of these visitors)	Yes (65.2% visited other Ontario regions)	Yes (57.2% visited Toronto)	Yes
Niagara Falls	Yes (processed 13.4% of these visitors)	Yes (50.8% visited other Ontario regions)	Yes (68.1% visited the Niagara region)	Yes
Overnight Overseas Visitors Entering Canada Through A Non-Ontario Port				
Prescott/ Stormont	Yes (processed 61.7% of these visitors)	Yes (at least 96.1% visited other Ontario regions)	No (3.9% visited the region)	No
Toronto	Yes (processed 29.3% of these visitors)	No (only 44.0% visited other Ontario regions)	Yes (100.0% visited Toronto)	No
All Overnight Overseas Visitors				
Toronto	Yes (processed 62.6% of Ontario's overnight overseas visitors)	Yes (63.0% visited other Ontario regions)	Yes (61.5% visited Toronto)	Yes
Niagara Falls	Yes (processed 10.7% of Ontario's overnight overseas visitors)	Yes (50.8% visited other Ontario regions)	Yes (68.1% visited the Niagara region)	Yes
Prescott/ Stormont	Yes (processed 14.4% of Ontario's overnight overseas visitors)	Yes (at least 96.1% visited other Ontario regions)	No (3.9% visited the region)	No

- Of the overnight overseas visitors who visited Ontario but entered Canada through a non-Ontario port, 44.9% visited one county, 30.6% visited two counties and 24.5% visited three or more counties. The average number of counties visited was 2.0.

- The majority of the South Korean and Japanese overnight visitors who entered Canada through Ontario's ports (59.7% and 56.0%, respectively), did so through Niagara Falls, while the majority

(63.6%) of Ontario's overnight French visitors entered Canada through Quebec.

- With the exception of French visitors, the majority of all other overnight overseas visitors to Ontario entered Canada through an Ontario port. In addition to the French market, Quebec played an important role in Ontario's European (UK 10.5% entered Canada through Quebec, Germany 12.5%, Other Europe 21.4%), as well as the South/central American markets (24.0% entered Canada through Quebec).

- Niagara and Toronto were the two regions with significant visitation levels by those who entered through the Niagara ports, while Toronto, Niagara and Ottawa are the regions with significant visitation levels by those who entered through the Toronto ports. Overall, the existing Ontario travel regions do not seem to be relevant as far as the overnight overseas visitors are concerned. The non-neighbouring regions of Toronto, Niagara and Ottawa appear to form a virtual travel region for these visitors.

- The overnight overseas visitors who entered Canada through the Toronto ports accounted for 60.4% of the total overnight overseas visitors to Northern Ontario.

- There does not seem to be a relationship between gateways/non-gateways and the average length of stay a visitor stays in Ontario. However, there is a strong relationship between the number of regions a visitor who goes through a specific port of entry visits and the average length of stay in Ontario. That is, the more regions an overseas visitor visits in Ontario, the longer the length of stay.

- Overseas visitors who entered Canada through Toronto had the second highest average lengths of stay in Ontario (9.87 nights).

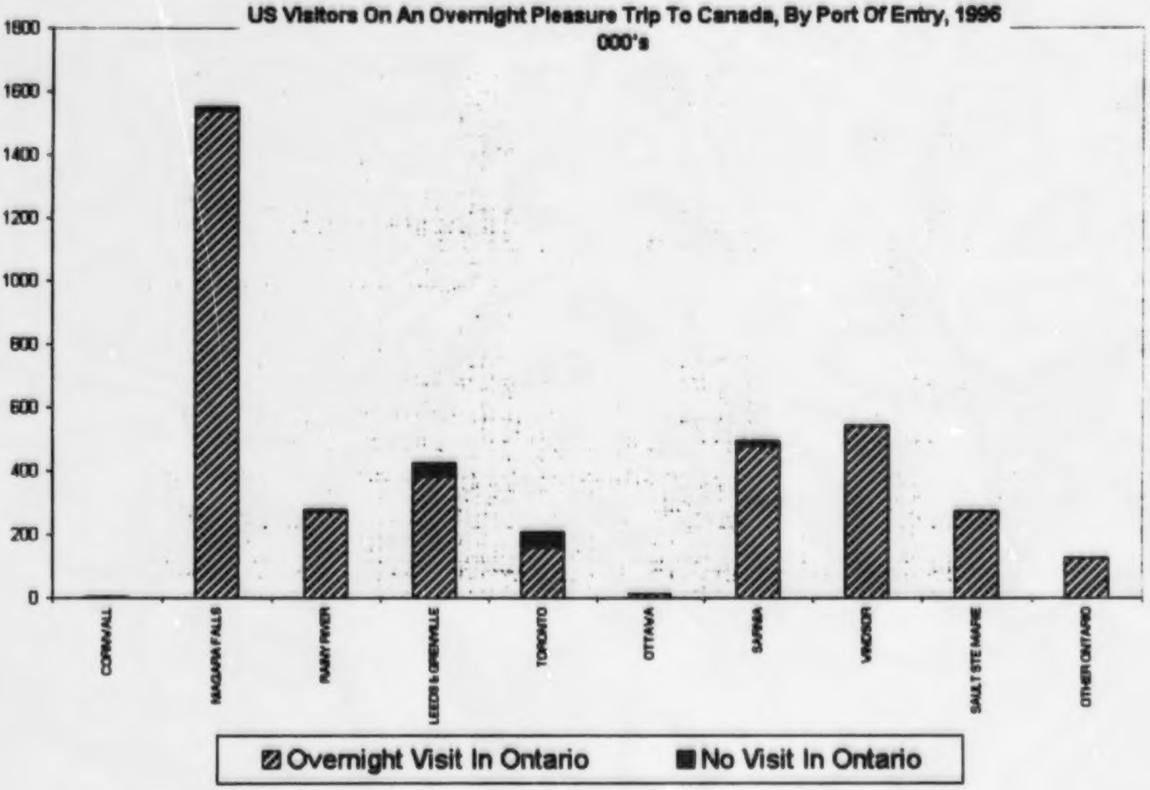
B.3. The Overnight Pleasure Market

B.3.1. The US Overnight Pleasure Market

A total of 3.909 million Americans entered Canada through Ontario's ports while on an overnight pleasure trip. Of those, 3.0% (or 117,000) did not visit Ontario. The remaining 3.792 million who visited Ontario accounted for 97.4% of the province's total overnight pleasure visitors from the US.

The ports of Rainy River and SS Marie accounted for 60.8% of the total overnight pleasure visits made by US visitors in northern Ontario.

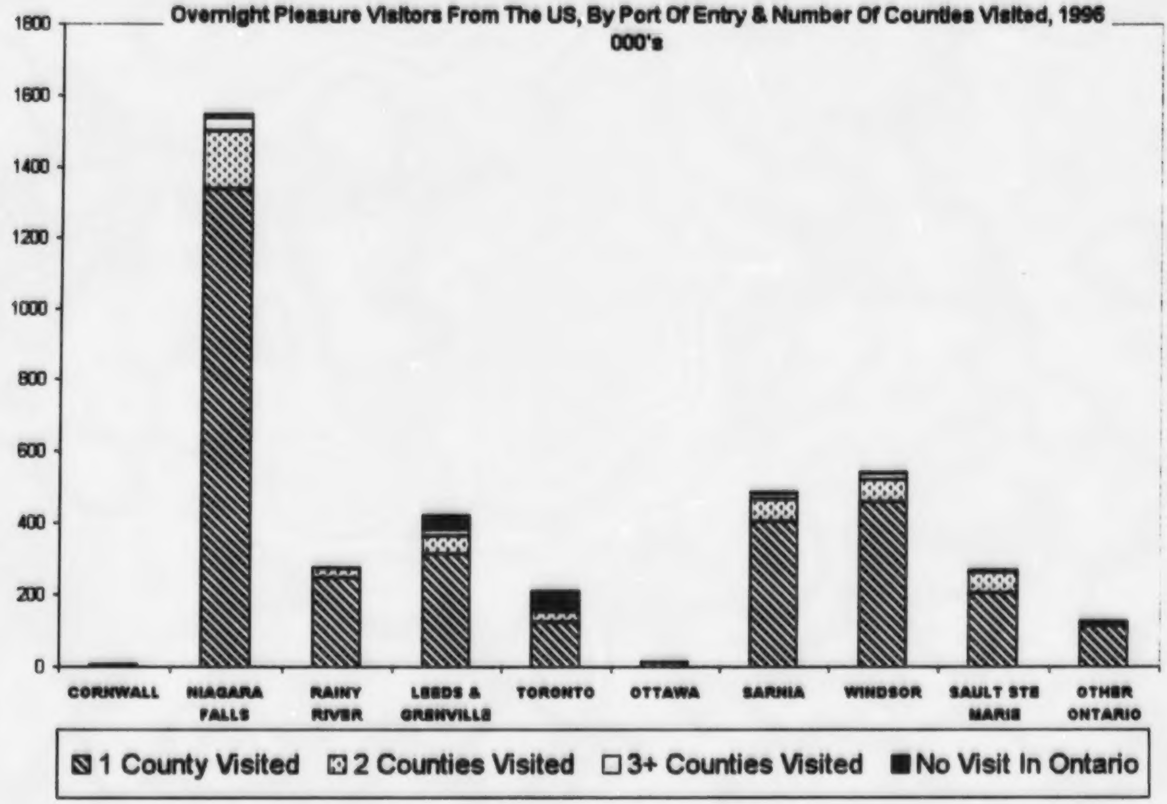
Of those who did not visit Ontario, 34.2% entered Canada through the Leeds & Grenville ports, 41.9% through the Toronto ports and 9.4% through the Niagara ports.



In 1996, there were four provincially significant and two regionally significant international ports as far as the overnight pleasure visitors from the US who entered Canada through Ontario's ports were concerned: Niagara, accounting for 39.7% of these visitors, Windsor, accounting for 13.9%, Sarnia, accounting for 12.6% and Leeds & Grenville, accounting for 10.8%, were the four provincially significant ports, while Rainy River, accounting for 7.1% and Sault Ste. Marie, accounting for 6.9%, were the regionally significant ports.

Although the Toronto ports were second to Niagara among the overall overnight US visitors, they only accounted for 5.3% of the overnight pleasure visitors from the US. The reason for the decline in Toronto's prominence in the overnight pleasure market is that 61.0% (or 765,000) of the overnight US visitors who entered Canada through its ports were on a business trip.

Sault Ste. Marie had the best dispersion rate of overnight pleasure visitors from the US who entered Canada through its ports (average number of regions visited=1.3), followed by Windsor (average number of regions visited=1.2) and Sarnia (average=1.17). Overall, the Americans who entered Canada through the Ontario ports while on an overnight pleasure visited on average 1.16 counties/districts, while those who had a visit in Ontario visited 1.20 counties/districts.



As was the case with the total overnight visitors from the US, the overwhelming majority of the overnight pleasure visitors (82.3%) visited only one county/district.

Overnight US Pleasure Visitors Entering Canada Through Ontario Ports							
Average Length Of Stay In Ontario (In Nights)							
All Ontario Ports	Niagara Falls	Rainy River	Leeds & Grenville	Toronto	Sarnia	Windsor	Sault Ste. Marie
3.18	2.57	5.25	4.09	3.34	2.74	3.29	3.37

The southern ports of Niagara, Leeds & Grenville, Sarnia, Windsor and Toronto accounted for 19.8% of the overnight pleasure visitors from the US who visited Ontario's north.

As far as the overnight US pleasure market is concerned, there does not seem to be a relationship between gateways/non-gateways and average length of stay in Ontario. As the table below demonstrates, the US pleasure visitors who entered Canada through Niagara Falls, the only provincial gateway, and SS Marie, the only regional gateway, did not have the highest average lengths of stay in Ontario.

Of the overnight pleasure visitors from the US who came to Ontario in 1996 and visited only the region of the port of entry, the average length of stay in Ontario was 2.64 nights. Those who visited only one Ontario region, other than that of the port of entry, had an average of 3.20 nights, those who visited two counties had an average of 4.49 nights and those who visited three or more counties had an average of 6.61 nights.

Overnight Pleasure-US	Port Of Entry Into Ontario		
	All Ontario Ports	Niagara Falls	S.S. Marie
Number of Regions Visited	Average Length Of Stay In Ontario		
Only the region of the port of entry	2.64 nights	2.04 nights	3.47 nights
One Ontario region- other than the port	3.20 nights	2.57 nights	2.87 nights
Two Ontario regions	4.49 nights	3.96 nights	3.26 nights
Three or more Ontario regions	6.61 nights	6.60 nights	7.38 nights

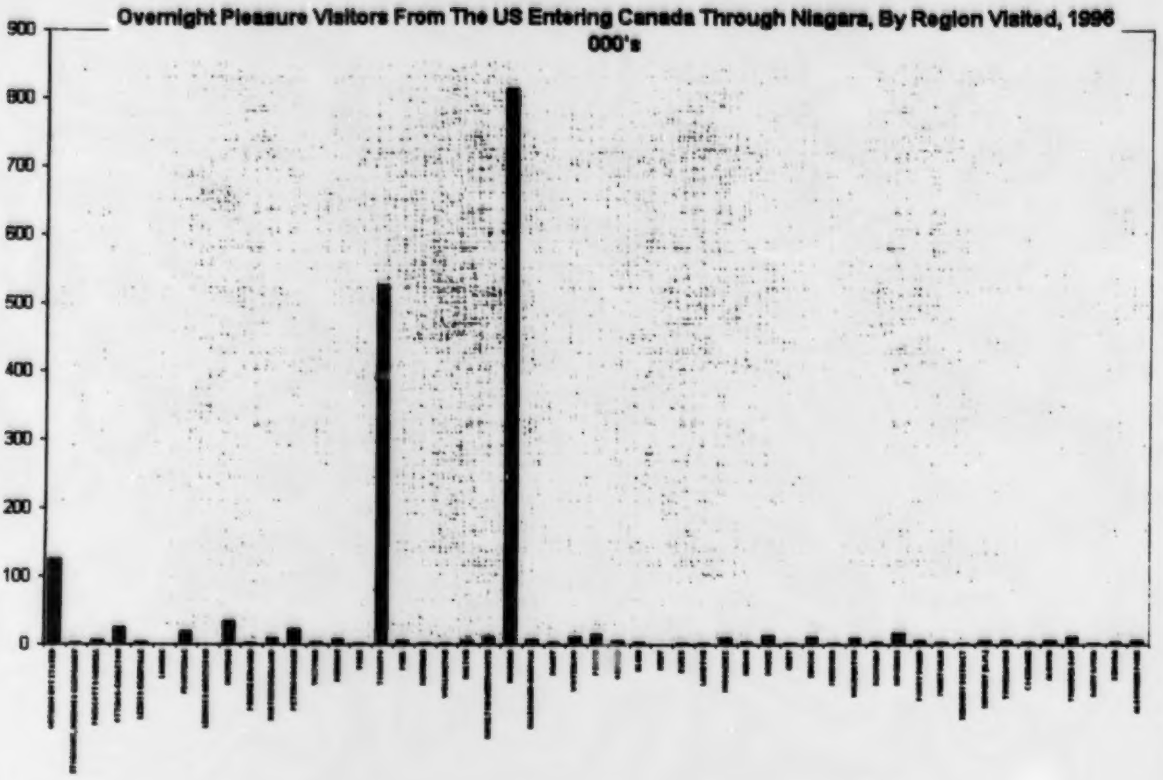
The same relationship between number of regions visited and average length of stay in Ontario is also observed for individual ports. For example, the tables above shows the average lengths of stay and the number of regions visited for Niagara Falls, SS Marie and all Ontario ports. What these data show is that if, for example, the Americans who entered the province through Niagara Falls and visited only the Niagara region (42.8%) could be made to visit one more region, their average length of stay could almost double.

Niagara Falls Of the total number of overnight pleasure visitors from the US who entered Canada through the Niagara ports (1.55 million), 52.5% visited the Niagara region, 33.9% visited Toronto and 2.2% visited Hastings. All other Ontario regions received minimal levels of visitation.

A total of 42.8% of the Americans who entered Canada through the Niagara ports for an overnight pleasure trip visited only the Niagara region. Since a majority also visited the region, Niagara Falls is an international gateway to Ontario for these visitors.

Of the Americans who entered Canada through the Niagara ports and visited Toronto (525,000), 75.4% visited only Metro. Waterloo, Hamilton and Brant county received minimal visitation levels ranging from 12,000 (or 0.8%) for Waterloo to 3,000 for Brant.

The overnight pleasure visitors from the US who entered Canada through the Niagara ports and visited the region (813,000) accounted for 77.9% of Niagara's total overnight pleasure visits from the US, while those who visited Toronto accounted for 49.3% of Toronto's total overnight pleasure visitors from the US. As such, the Niagara ports play an important role for both regions' overnight pleasure market from the US.



Windsor Of the total overnight pleasure visitors from the US who entered Canada through Windsor (542,000), 38.0% visited Toronto, 22.0% visited Essex, 17.2% visited Niagara, 6.1% visited Kent, 4.4% visited Hamilton-Wentworth and 4.2% visited Perth. All other Ontario regions received minimal visitation levels.

Only 18.5% of the Americans who entered Canada through the Windsor ports while on an overnight pleasure trip visited solely the Essex county. However, since only 22.0% visited Essex, the region is not an international gateway to Ontario for these visitors.

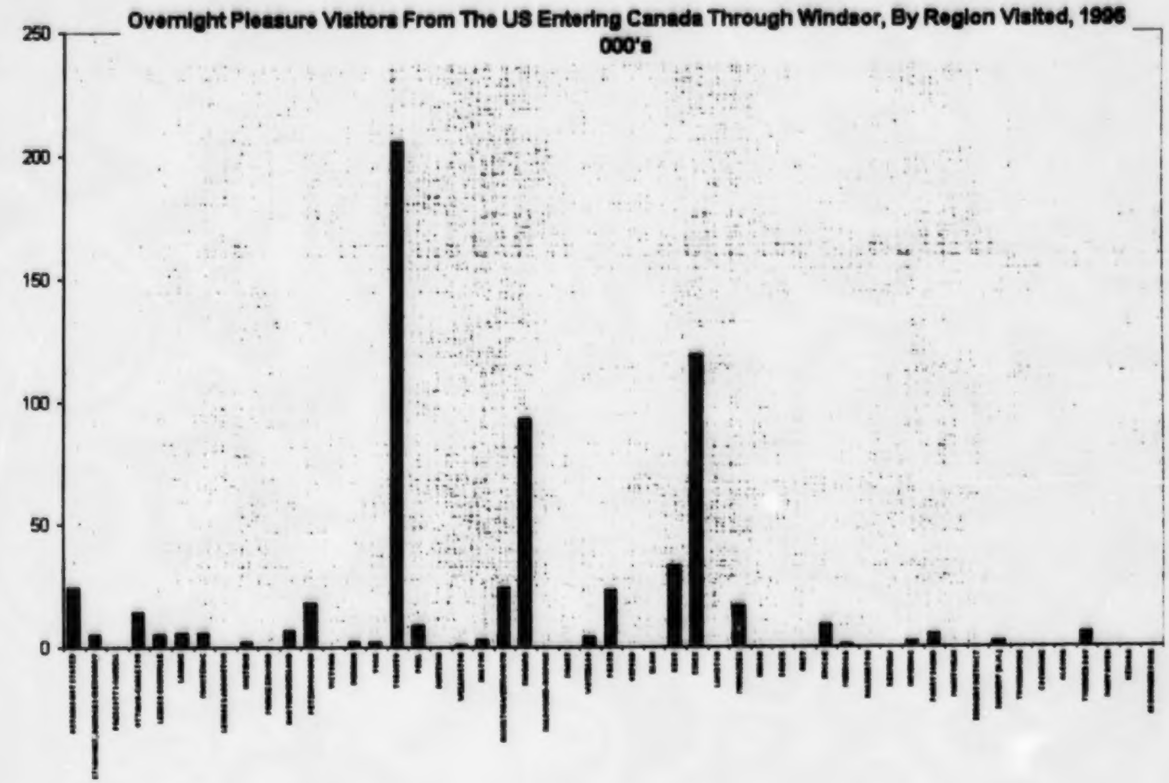
The overnight pleasure visitors from the US who entered Canada through the Windsor ports and visited Essex accounted for 74.8% of the total overnight pleasure visitors from the US who visited Essex in 1996, while those who visited Toronto accounted for 19.4% of Toronto's total overnight US pleasure visitors.

The region formed by Essex, Kent, Lambton, Middlesex, Elgin, Oxford, Perth and Huron, received 30.8% of the total visits with a known Ontario destination generated by the US visitors who entered Canada through the Windsor ports while on an overnight pleasure trip. As such, this region is not a destination region either for these visitors.

Sarnia Of the total number of overnight pleasure visitors from the US who entered Canada through Sarnia (491,000), 27.5% visited Toronto, 21.4% visited Perth, 15.9% visited Niagara, 13.0% visited Lambton, 6.1% visited Bruce and 5.3% visited Middlesex. All other Ontario regions received minimal visitation levels.

Only 10.0% of the overnight pleasure visitors from the US who entered Canada through Sarnia visited solely Lambton and 13.0% visited Lambton. As such, Sarnia is not an international gateway to Ontario for these visitors.

The overnight US visitors who entered Canada through Sarnia while on a pleasure trip accounted for 92.8% of Lambton's total overnight pleasure visitors from the US.



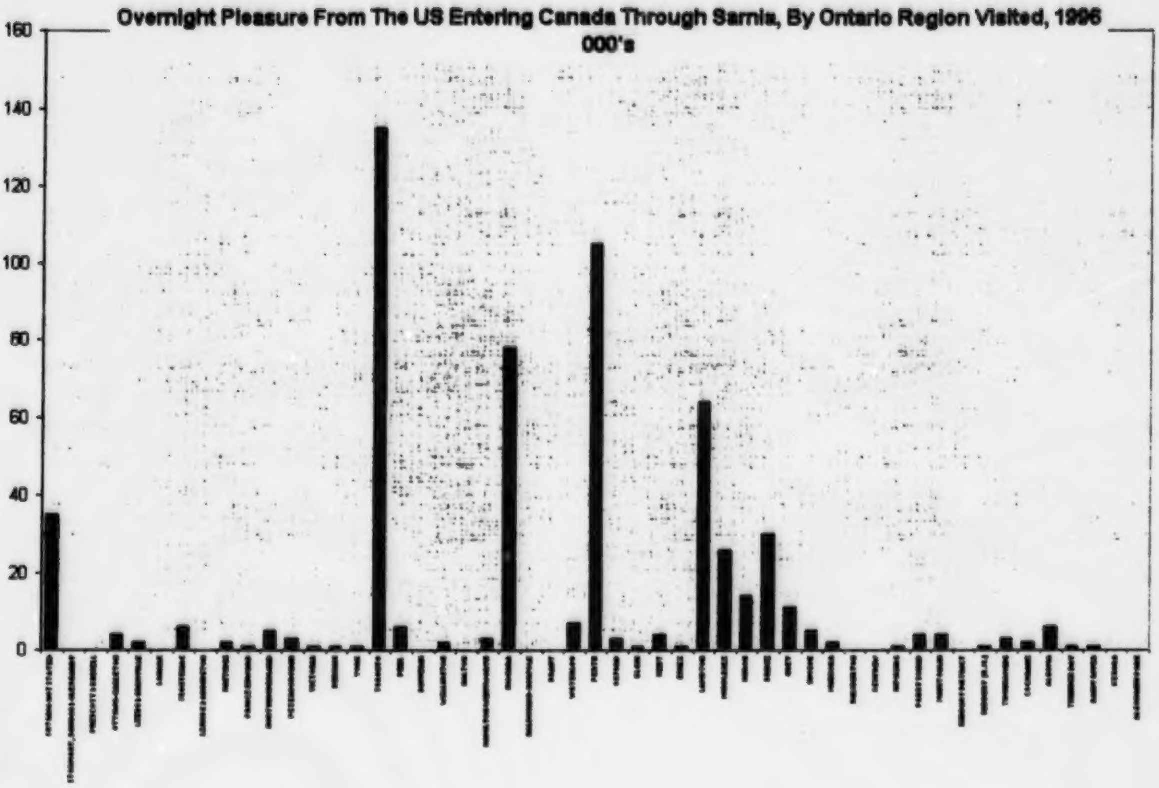
The region formed by Essex, Kent, Elgin, Middlesex, Lambton, Oxford, Perth and Huron received 40.2% of the total visits with know Ontario destination generated by the overnight pleasure visitors from the US who entered Canada through Sarnia. As such, this region is also not a destination area for these visitors.

Leeds & Grenville Of the total number of US visitors who entered Canada through the Leeds & Grenville ports (423,000), 29.1% visited Leeds & Grenville, 20.8% visited Ottawa-Carleton, 15.6% visited Frontenac, 5.4% visited Victoria, 5.4% visited Toronto, 5.2% visited Algoma and 4.3% visited Lanark. All other Ontario regions received minimal visitation levels.

Only 22.9% of the overnight pleasure visitors from the US who entered Canada through Leeds & Grenville visited solely the county itself. However, since only a total of 29.1% visited Leeds & Grenville, the county is not an international gateway to Ontario for these visitors.

The overnight US visitors who entered Canada through Leeds & Grenville while on a pleasure trip accounted for 86.6% of the county's total overnight pleasure visitors from the US.

The region formed by Lennox & Addington, Frontenac, Leeds & Grenville, Lanark, Ottawa-Carleton, Stormont, Dundas & Glengarry and Prescott & Russell, received 68.6% of the total visits with known Ontario destination generated by the overnight pleasure visitors from the US who entered Canada through Leeds & Grenville. As such, this region is a destination area for these visitors.



Rainy River Of the total number of US visitors who entered Canada through the Rainy River ports (277,000), 48.0% visited the Kenora district, 18.4% visited the Thunder Bay district and 17.3% visited the Rainy River district. All other Ontario regions received minimal visitation levels.

Only 13.7% of the overnight pleasure visitors from the US who entered Canada through Rainy River visited solely the district itself. However, since only a total of 17.3% visited Rainy River, the district is not a regional gateway to Ontario for these visitors.

The overnight US visitors who entered Canada through Rainy River while on a pleasure trip accounted for 90.6% of the district's total overnight pleasure visitors from the US.

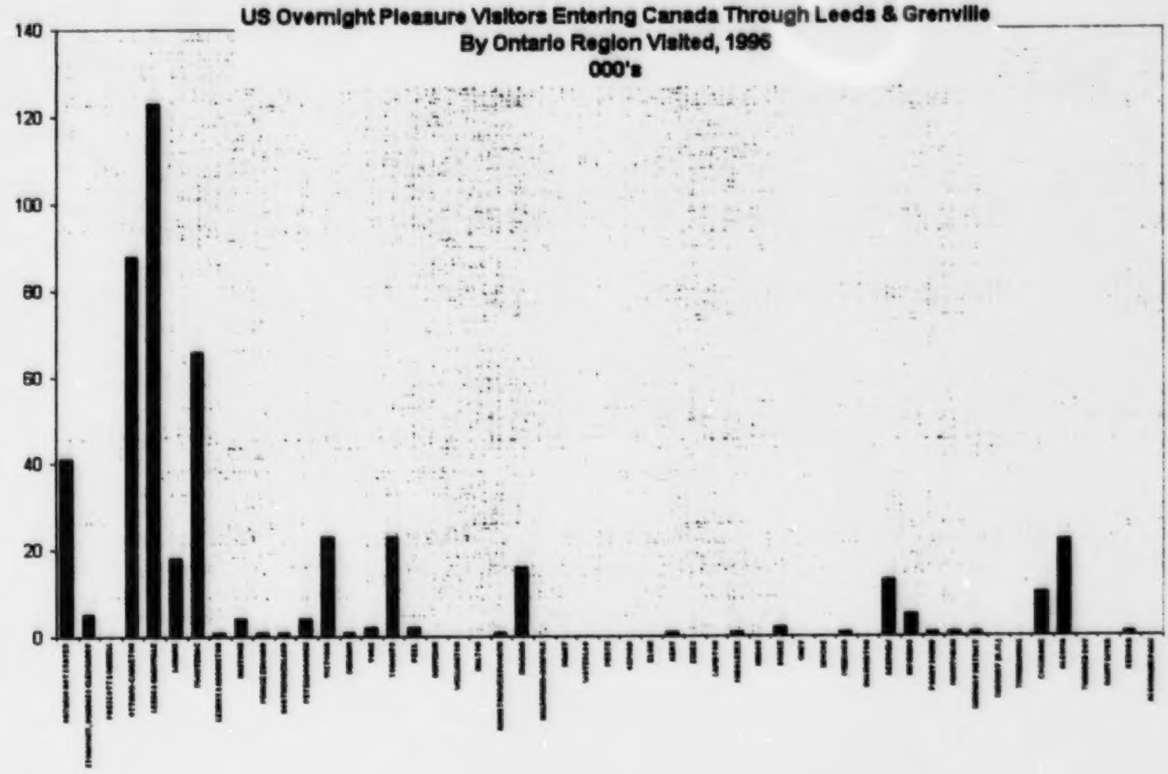
The region formed by Kenora, Rainy River and Thunder Bay received 91.7% of the total visits with known Ontario destination generated by the overnight pleasure visitors from the US who entered Canada through Rainy River. As such, this region is a destination area for these visitors.

Sault Ste. Marie Of the total number of US visitors who entered Canada through the SS Marie ports (271,000), 58.3% visited the Algoma district, 9.6% visited Toronto, 7.7% visited Grey county, 6.3% visited Ottawa-Carleton, 5.9% visited Sudbury district and 5.5% visited the Thunder Bay district. All other Ontario regions received minimal visitation levels.

A total of 48.0% of the overnight pleasure visitors from the US who entered Canada through SS Marie visited only the district itself. Since a total of 58.3% of these visitors also visited Algoma, the district is a regional gateway to Ontario for these visitors.

The overnight US visitors who entered Canada through SS Marie while on a pleasure trip accounted for 76.3% of the district's total overnight pleasure visitors from the US.

The region formed by Algoma, Thunder Bay, Sudbury district, Sudbury RM and Manitoulin received 65.1% of the total visits with known Ontario destination generated by the overnight pleasure visitors from the US who entered Canada through SS Marie. As such, this region is a destination area for these visitors.



Conclusions:

- The overnight pleasure visitors from the US who entered Canada through Ontario's ports and visited the province accounted for 97.4% of Ontario's overnight pleasure visitors from the US.
- For the overnight pleasure visitors from the US who entered Canada through Ontario's ports in 1996, there were four provincially significant ports, Niagara Falls, Windsor, Sarnia and Leeds & Grenville accounting for 76.9% and two regionally significant ports, Rainy River and SS Marie accounting for 14.0% of these visitors.
- Toronto processed only 5.3% of these visitors, losing its second place among the overall overnight US visitors. The reason for Toronto's decline is that the majority of the overnight US visitors who entered Canada through its ports (61.0%) were on a business trip.
- The majority of the US overnight visitors (82.3% overall) who entered Canada through Ontario's ports while on a pleasure trip, visited only one county/district in 1996. On average these visitors visited 1.16 Ontario counties, while those who had a visit in the province visited on average 1.20

counties. These averages are slightly higher than the overall overnight US visitors who entered Canada through the Ontario ports (1.13 counties for all entrants and 1.17 for those with a visit in the province).

	OVERNIGHT PLEASURE VISITORS FROM THE US, 1996			
Name of Port	**Significant Port?**	**Significant Visits to Other Ontario Regions?**	**Significant Destination?**	**Gateway?**
Niagara Falls	**Yes at the provincial level** (39.8% of Ontario's overnight pleasure visitors from the US)	Yes (57.2% visited other Ontario regions)	Yes (52.5% visited the Niagara region)	Yes
Windsor	**Yes at the provincial level** (13.9% of Ontario's overnight pleasure visitors from the US)	Yes (81.5% visited other Ontario regions)	No (22.0% visited Essex)	No
Sarnia	**Yes at the provincial level** (12.6% of Ontario's overnight pleasure visitors from the US)	Yes (90.0% visited other Ontario regions)	No (13.0% visited Lambton)	No
Leeds & Grenville	**Yes at the provincial level** (10.9% of Ontario's overnight pleasure visitors from the US)	Yes (77.1% visited other Ontario regions)	No (29.1% visited the L&G)	No
Rainy River	**Yes regionally** (37.5% of the North's overnight pleasure visitors from the US, 7.1% of Ontario's)	Yes (86.3% visited other Ontario regions)	No (17.3% visited the Rainy River)	No
SS Marie	**Yes regionally** (36.7% of the North's overnight pleasure visitors from the US, 7.0% of Ontario's)	Yes (52.0% visited other Ontario regions)	Yes (58.3% visited Algoma)	Yes

- The overnight pleasure visitors from the US who entered Canada through the Niagara Falls' ports played a significant role for the Niagara region's total overnight pleasure visitors from the US (77.9%), as well as Toronto's (49.3%).

- Windsor and Sarnia also played an important role for Toronto's total overnight pleasure visitors from the US (accounting for 19.4% and 12.7%, respectively, of Toronto total US overnight pleasure visitors).

- The ports of Rainy River and SS Marie accounted in 1996 for 60.8% of northern Ontario's total overnight pleasure visitors from the US.

- OTAP 1 is not a destination region for the overnight pleasure visitors from the US who entered Canada through the Windsor ports (received 30.8% of visits with known destination).

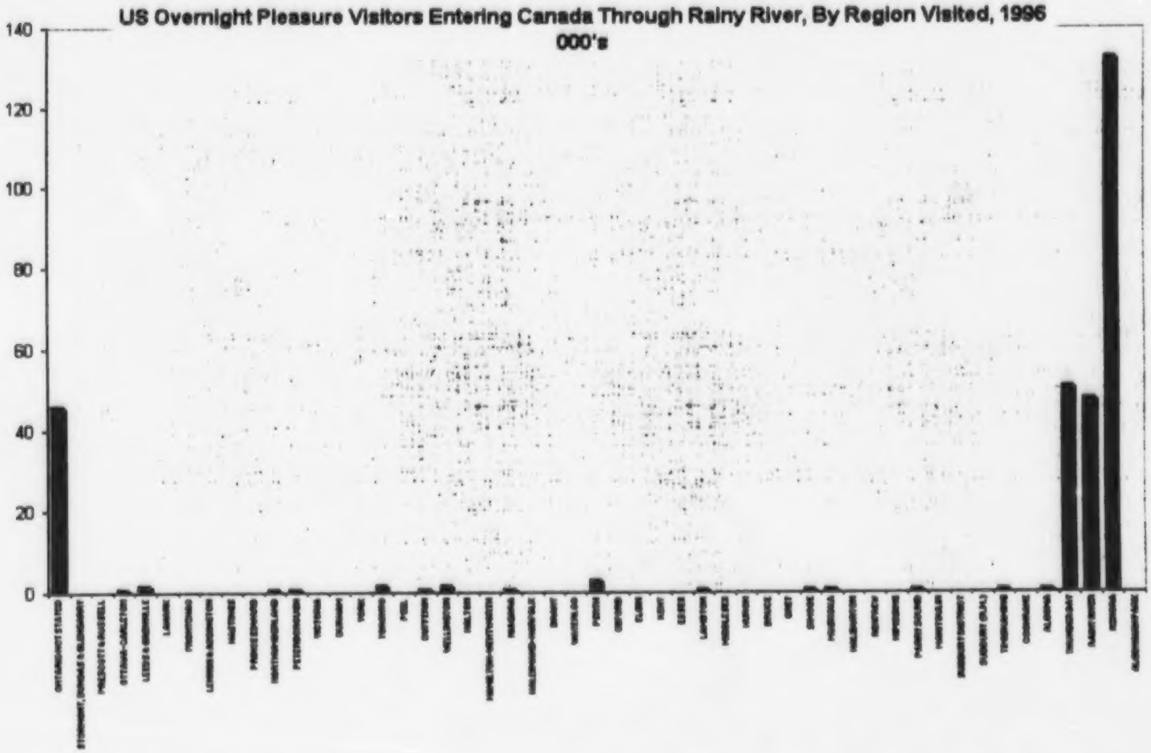
- OTAP 1 is also not a destination region for the overnight pleasure visitors from the US who entered Canada through the Sarnia ports (received 40.2% of visits with known destination).

- OTAP 6 is a destination region for the overnight US pleasure visitors who entered Canada through the Leeds & Grenville ports (the area from Lennox & Addington to Prescott & Russel in the east and Lanark in the north received 68.6% of the known visits).

- Kenora, Thunder Bay and Rainy River constitute a destination region for the overnight pleasure visitors from the US who entered Canada through the Rainy River ports (received 91.7% of the visits with known destination).

- Algoma, Sudbury district, Sudbury RM and Manitoulin constitute a destination region fro the US overnight pleasure visitors who entered Canada through the SS Marie port (received 60.1% of know visits).

- There does not appear to be a relationship between gateways/non-gateways and the overnight US pleasure visitors' average length of stay in Ontario. However, there is a strong relationship between the number of regions visited and the average length of stay of those visitors who enter Canada through a specific port. That is, the larger the number of regions visited, the longer the length of stay.


US Overnight Pleasure Visitors Entering Canada Through Rainy River, By Region Visited, 1996
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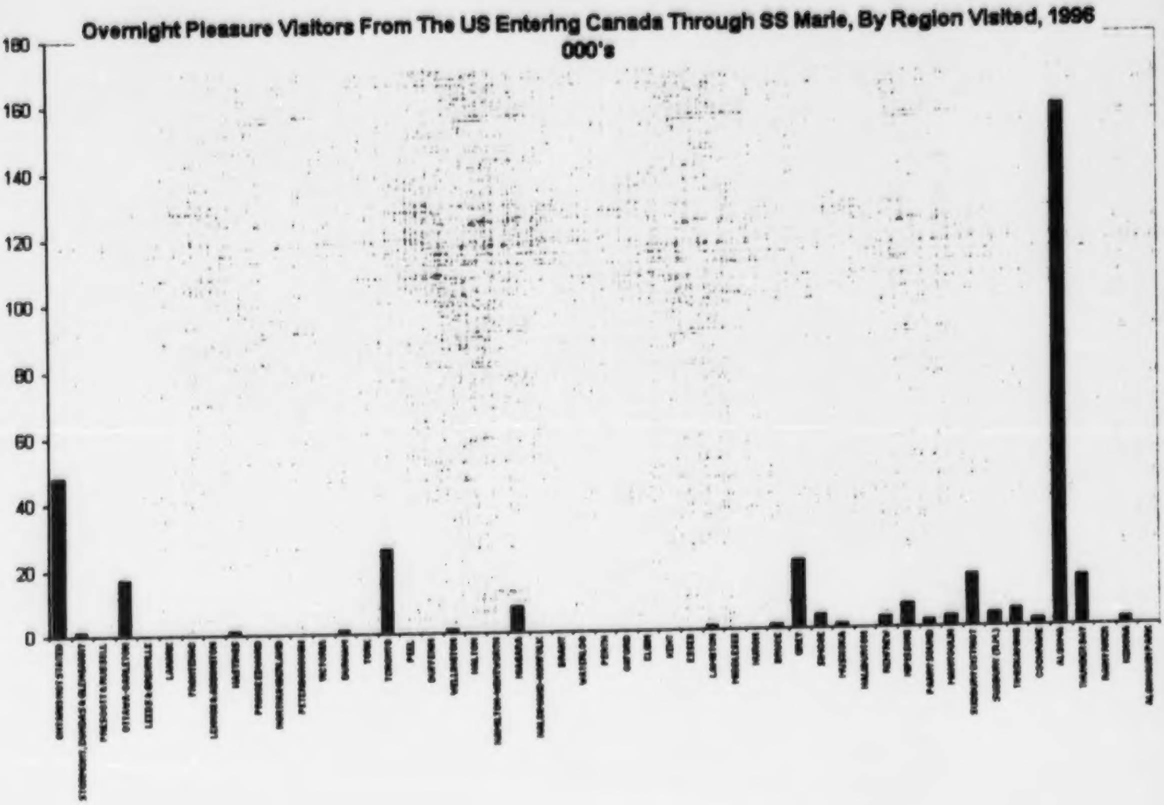

Overnight Pleasure Visitors From The US Entering Canada Through SS Marie, By Region Visited, 1996
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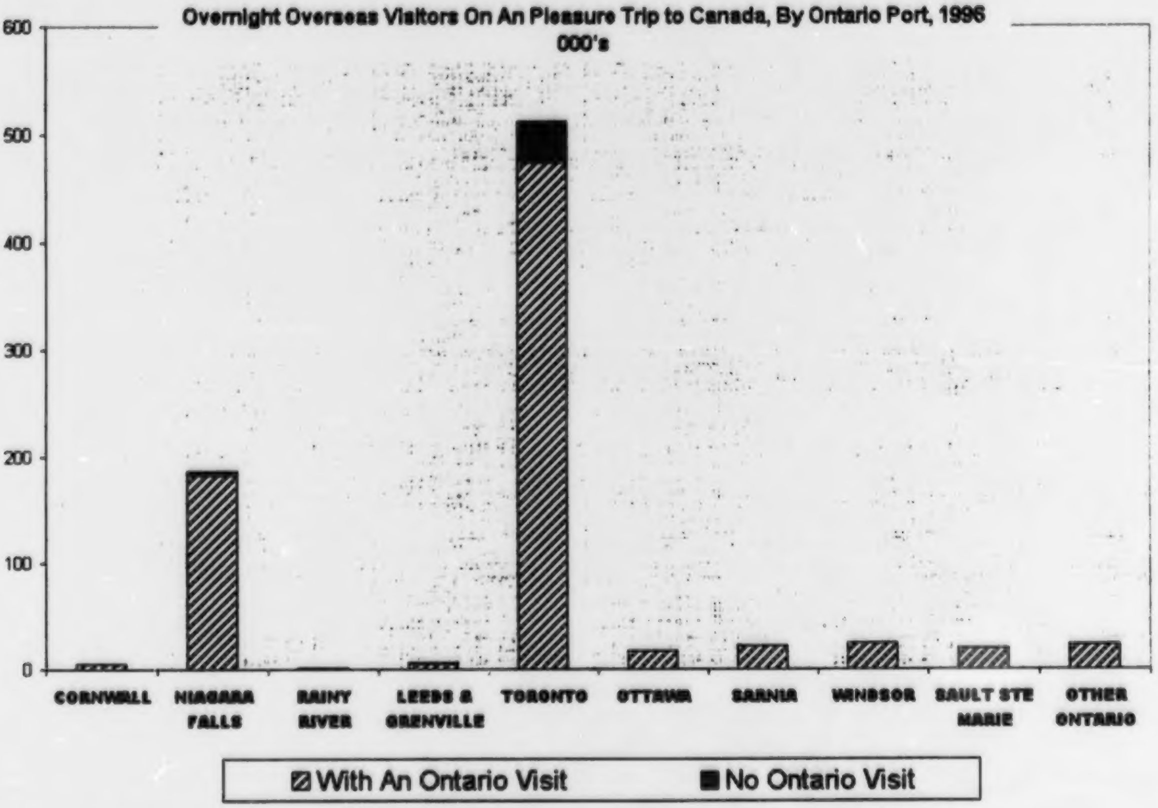
B.3.2. The Overseas Overnight Pleasure Market

A total of 817,000 overseas residents entered Canada through Ontario's ports, in 1996, while on an overnight pleasure trip. Of those, 5.1% (or 42,000) did not visit Ontario. The remaining 775,000 who visited Ontario accounted for 69.9% of the province's total overnight pleasure visitors from overseas countries. Compared to the total overnight visitors from overseas, these statistics indicate that a higher proportion of the overnight pleasure visitors from overseas entered Canada through non-Ontario ports (30.1% vs. 23.3%).

Toronto processed 62.7% of the overnight pleasure visitors from overseas countries who entered Canada through the Ontario ports and Niagara Falls processed 22.8%. Windsor processed 3.1%, Sarnia for 2.7% and SS Marie 2.3%. These higher shares of overnight overseas pleasure visitors entering Ontario through land ports indicate that, compared to the overall overnight overseas visitors, a higher proportion of the pleasure visitors come to Ontario via the US.

Of the overnight pleasure visitors from overseas who visited Ontario but entered Canada through a non-Ontario port (334,000), 72.8% did so through Quebec, 21.3% through BC and 6.0% through other Canadian ports.


Overnight Overseas Visitors On An Pleasure Trip to Canada, By Ontario Port, 1996
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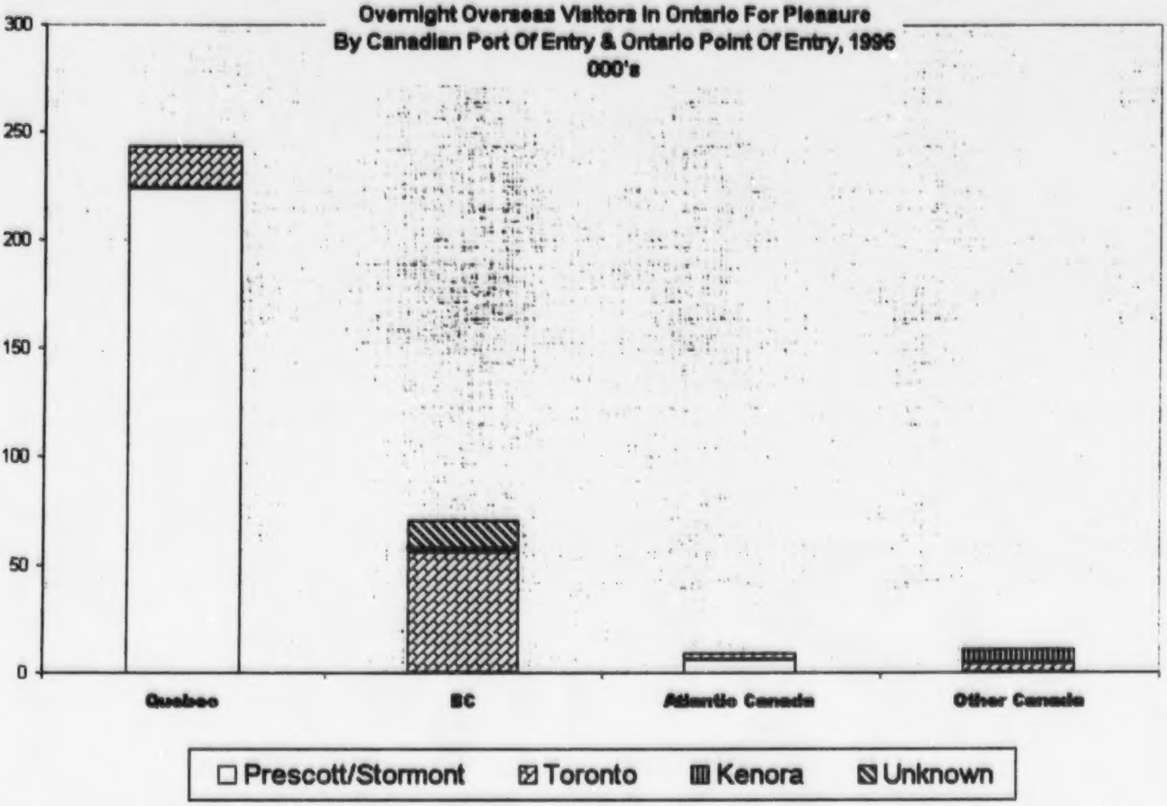
Of those who visited Ontario but entered Canada through a non-Ontario port and had a known transportation mode within Canada (269,000), 65.8% came to Ontario through the region formed by Prescott & Russell- Stormont, Dundas & Glengarry, 27.5% came through Toronto, 3.0% came through Kenora and 3.7% through a western, but indeterminate Ontario point of entry.

Of Ontario's main overseas pleasure markets, France had the lowest share of Ontario visitors entering

Canada through an Ontario port (only 30.8% of Ontario's total overnight pleasure visitors from France entered Canada through an Ontario port) and Japan had the highest (81.3%). UK had the second highest share (78.8%) followed by Germany (78.7%). As can be seen in the table below, Toronto's prominence declined in the overnight pleasure market, while Niagara Falls and Quebec's increased.



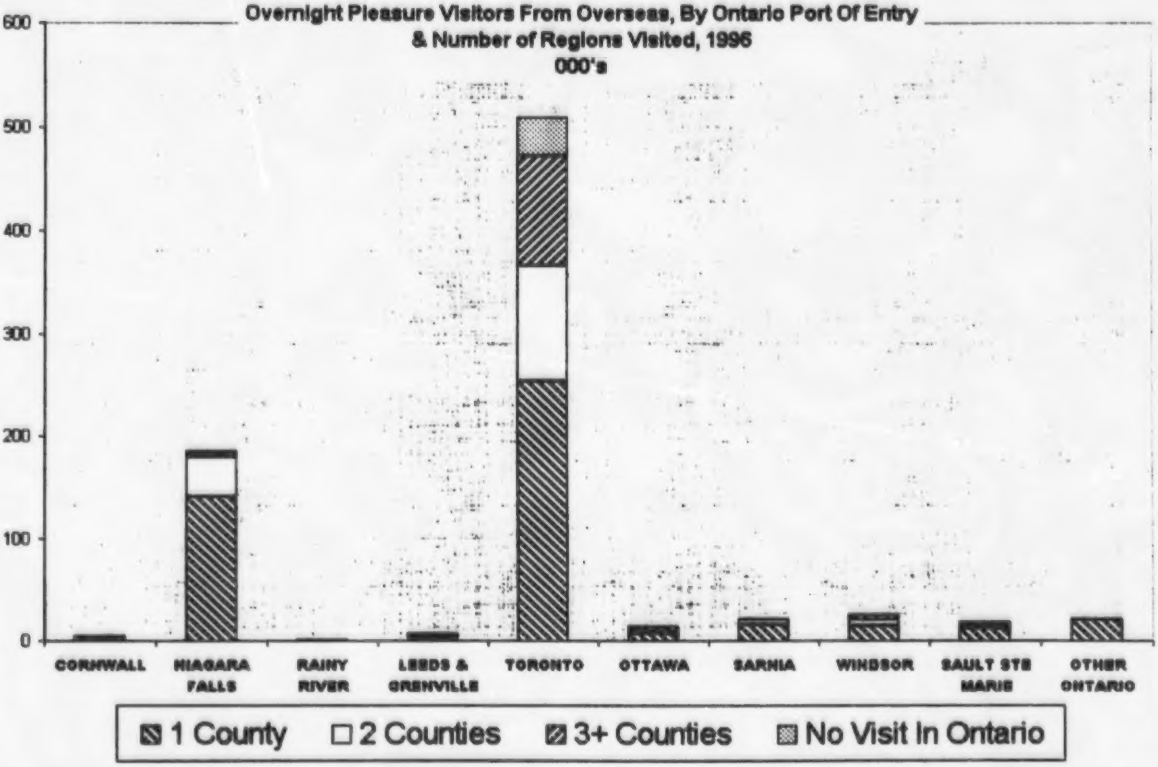
Although Niagara Falls processed 22.8% of the overnight pleasure visitors from overseas countries who entered Canada through the Ontario ports, it processed 90.3% of the South Korean overnight pleasure visitors who entered Canada through Ontario and 74.1% of the Japanese visitors. These two countries accounted for 41.9% of the overnight pleasure visitors from overseas countries who entered Canada through Niagara Falls.

Of those who did not visit Ontario, 90.5% entered Canada through the Toronto ports and 7.1% through the Niagara ports.

The above statistics indicate that in 1996, there were two provincially significant international ports as far as the overnight pleasure visitors from overseas countries who entered Canada through Ontario's ports were concerned: Toronto and Niagara Falls. Of these ports, only Toronto is an international getaway into Ontario as the number of visitors who visited only the region that contained these ports were 33.6% for Toronto/Peel and 53.8% for Niagara. However, both regions are destination regions for those who entered through their ports since 66.8% visited Toronto and 72.6% visited the Niagara region.

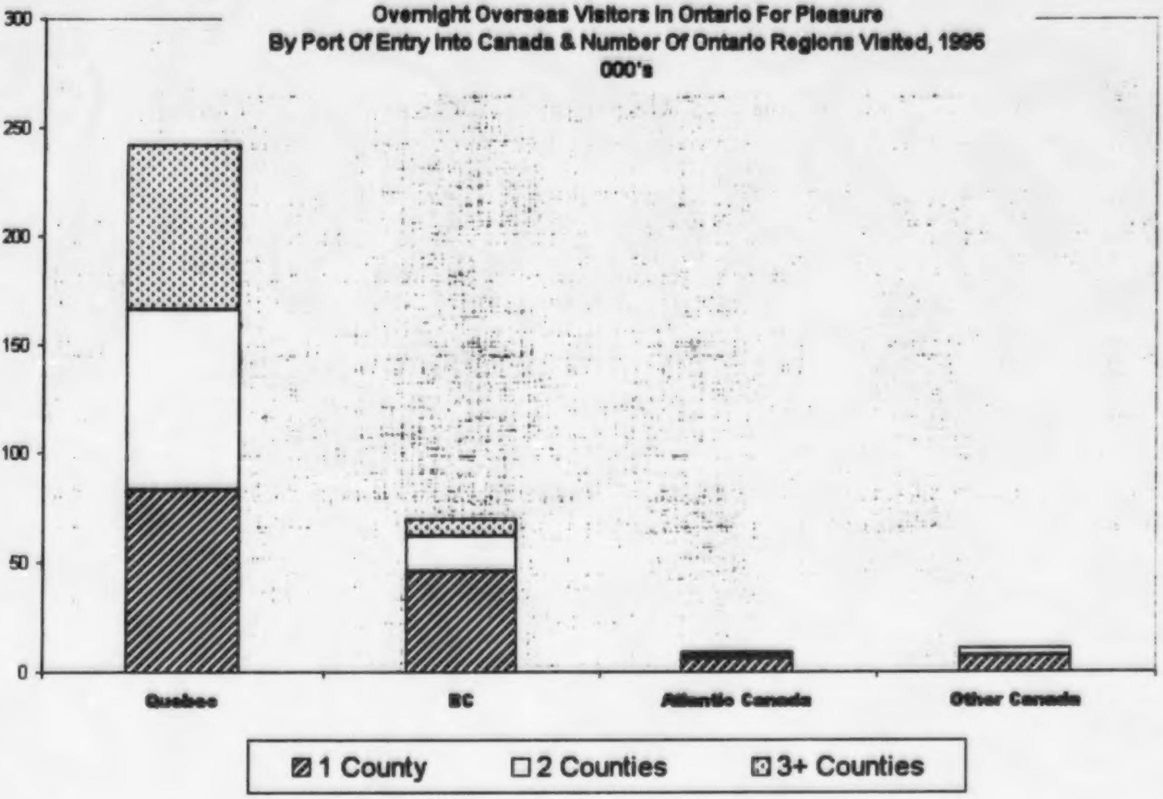
With respect to the overnight pleasure visitors from overseas countries who entered Canada through a non-Ontario port and visited the province, the region formed by Prescott & Russell and Stormont, Dundas & Glengarry, as well as Toronto, are the provincially significant points of entry into the province.

	Total Overnight Pleasure Visits In Ontario	Port of Entry Into Canada, 1996					
Origin Of Visitors		Toronto	Niagara Falls	Quebec	BC	Other Ontario	Other Canada
UK	174,000 (100.0%)	120,000 (69.0%)	4,000 (2.3%)	32,000 (18.4%)	3,000 (1.7%)	13,000 (7.5%)	2,000 (1.1%)
France	133,000 (100.0%)	35,000 (26.3%)	4,000 (3.0%)	91,000 (68.4%)	1,000 (0.8%)	2,000 (1.5%)	0 (0.0%)
Germany	122,000 (100.0%)	79,000 (64.8%)	7,000 (5.7%)	20,000 (16.4%)	2,000 (1.6%)	10,000 (8.2%)	4,000 (3.3%)
Other Europe	162,000 (100.0%)	77,000 (47.5%)	10,000 (6.2%)	44,000 (27.2%)	3,000 (1.9%)	18,000 (11.1%)	10,000 (6.2%)
Japan	176,000 (100.0%)	36,000 (20.5%)	65,000 (36.9%)	6,000 (3.4%)	26,000 (14.8%)	42,000 (23.9%)	1,000 (0.6%)
Other Asia	213,000 (100.0%)	59,000 (27.7%)	80,000 (37.6%)	13,000 (6.1%)	29,000 (13.6%)	31,000 (14.6%)	1,000 (0.5%)
All Other	135,000 (100.0%)	68,000 (50.4%)	13,000 (9.6%)	36,000 (26.7%)	6,000 (4.4%)	9,000 (6.7%)	3,000 (2.2%)



Overnight Pleasure Visitors From Overseas, By Ontario Port Of Entry & Number of Regions Visited, 1996
000's

Prescott/Stormont, however, is not an international gateway into Ontario since only 2.9% of the overnight pleasure visitors from overseas who entered Ontario through that region also visited the area. Toronto is also not a gateway since 66.7% of those who came to Ontario through Toronto visited only Toronto. However, Toronto is a destination region for these visitors (100% visited Toronto).



Of the two provincially significant ports, for those who entered Canada through Ontario ports, Toronto had the best dispersion rate of overnight pleasure visitors from overseas countries (average number of regions visited=1.77), while those who entered through Niagara Falls visited on average 1.23 counties or districts. Overall, the overseas pleasure visitors who entered Canada through the Ontario ports visited on average 1.61 counties/districts, while those who had a visit in Ontario visited 1.70 counties or districts.

In contrast, those who visited Ontario but entered Canada through Quebec, visited on average 3.2 Ontario regions, while those who entered Canada through BC visited on average 1.91 Ontario regions. Overall, the visitors who visited Ontario but entered Canada through a non-Ontario port visited, on average, 2.9 Ontario regions.

As was the case with the total overnight visitors from overseas countries, the majority of the overnight pleasure visitors (57.9%) who entered Canada through Ontario ports visited only one county or district. However, since this proportion is substantially lower than the overall overnight visitors' from overseas (75.5%), it implies that pleasure visitors moved around the province more than other overnight visitors form overseas countries.

For those who visited Ontario but entered Canada through a non-Ontario port, 42.8% visited one county only, 31.1% visited two counties and 26.0% visited three or more counties, indicating that these visitors moved around the province more than those who entered Canada through Ontario ports. Those who visited Ontario, but entered Canada through Quebec had the lowest share of visitation to only one county (34.3%) and the highest for three or more counties (31.4%).

The ports of Toronto processed 45.2% of the overnight pleasure visitors from overseas countries who visited Ontario's north and 50.8% of those who visited Ontario. Niagara Falls processed 16.4% of the overnight pleasure visitors from overseas countries who visited Ontario and the Prescott/Stormont region processed 19.7% of these visitors.

As was the case with the total overnight overseas market, there does not appear to be a relationship between gateways/non-gateways and average length of stay in Ontario. Overseas pleasure visitors who entered Canada through Toronto, the only international gateway for this market, had an average length of stay in Ontario of 8.55 nights, the third largest after Rainy River's (15.47 nights) and Ottawa's (14.67 nights). Overseas pleasure visitors who entered Canada through Niagara Falls had the lowest average length of stay in Ontario (2.26 nights).

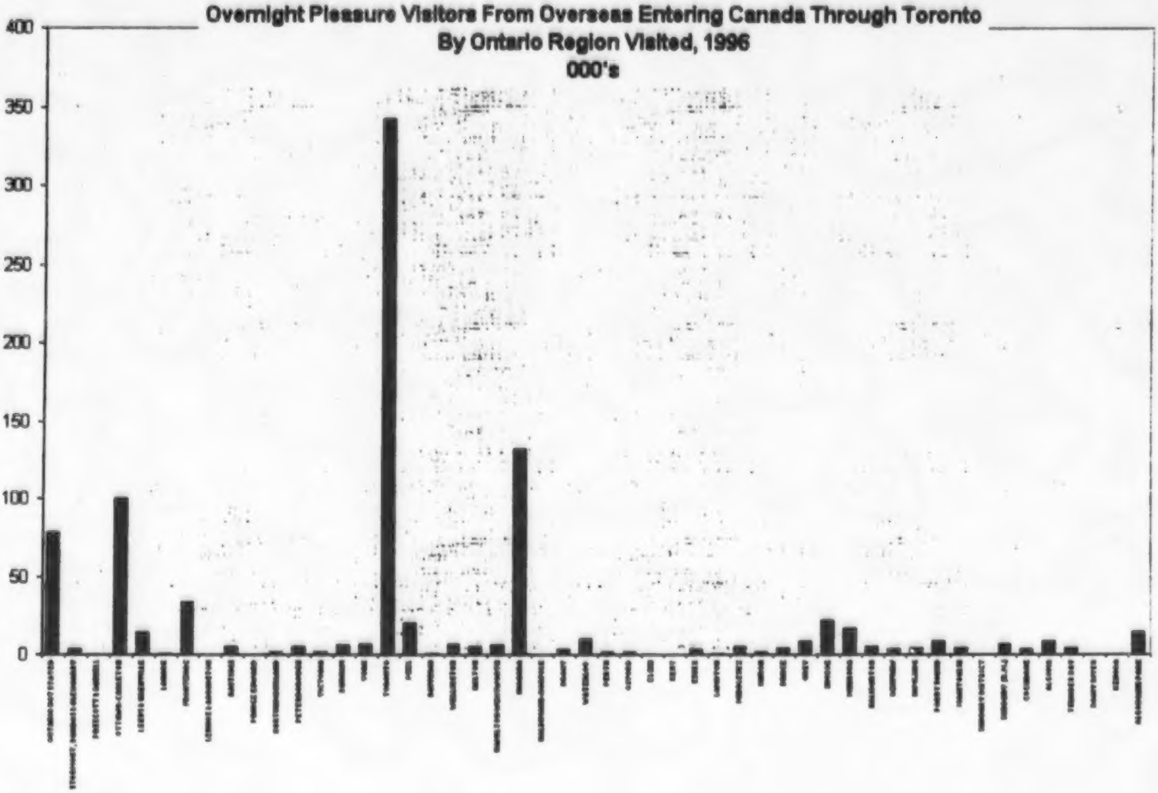
Overnight Pleasure-Overseas	Port Of Entry Into Ontario		
	All Ontario Ports	Niagara Falls	Toronto
Number of Regions Visited	Average Length Of Stay In Ontario		
Only the region of the port of entry	2.69 nights	1.44 nights	12.25 nights
One Ontario region- other than the port	6.64 nights	2.76 nights	8.15 nights
Two Ontario regions	6.98 nights	4.00 nights	8.38 nights
Three Ontario regions	9.71 nights	3.78 nights	10.55 nights
Four or more Ontario regions	14.23 nights	-	14.31 nights

The relationship between number of regions visited and the average length of stay for the overseas pleasure visitors who entered Canada through a specific port is also observed here. However, this relationship is not as strong for Toronto as it is for other Ontario ports. For example, those who entered Canada through Toronto and visited only Metro had a higher average length of stay in Ontario than those who visited one county (other than Toronto), two counties and three counties.

Toronto Of the total number of overnight pleasure visitors from overseas countries who entered Canada through the Toronto ports (512,000), 66.8% visited Toronto, 25.8% visited Niagara, 19.5% visited Ottawa-Carleton, 6.6% visited Frontenac, 4.3% visited Simcoe and 3.9% visited Peel. All other Ontario regions received minimal levels of visitation.

A total of 32.4% of the overseas who entered Canada through the Toronto ports for an overnight pleasure trip visited only Toronto. Since a majority of these visitors also visited the region, Toronto is also an international gateway for these visitors.

The overnight pleasure visitors from overseas countries who entered Canada through the Toronto ports and visited the region (342,000) accounted for 48.7% of Toronto's total overnight pleasure visits from overseas, while those who visited Niagara (132,000) accounted for 30.2% of Niagara's total overnight pleasure visitors from overseas, and those who visited Ottawa (100,000) accounted for 36.5% of Ottawa's total overnight pleasure visitors from overseas. As such, the Toronto ports play an important role for all three regions' overnight pleasure market from overseas.

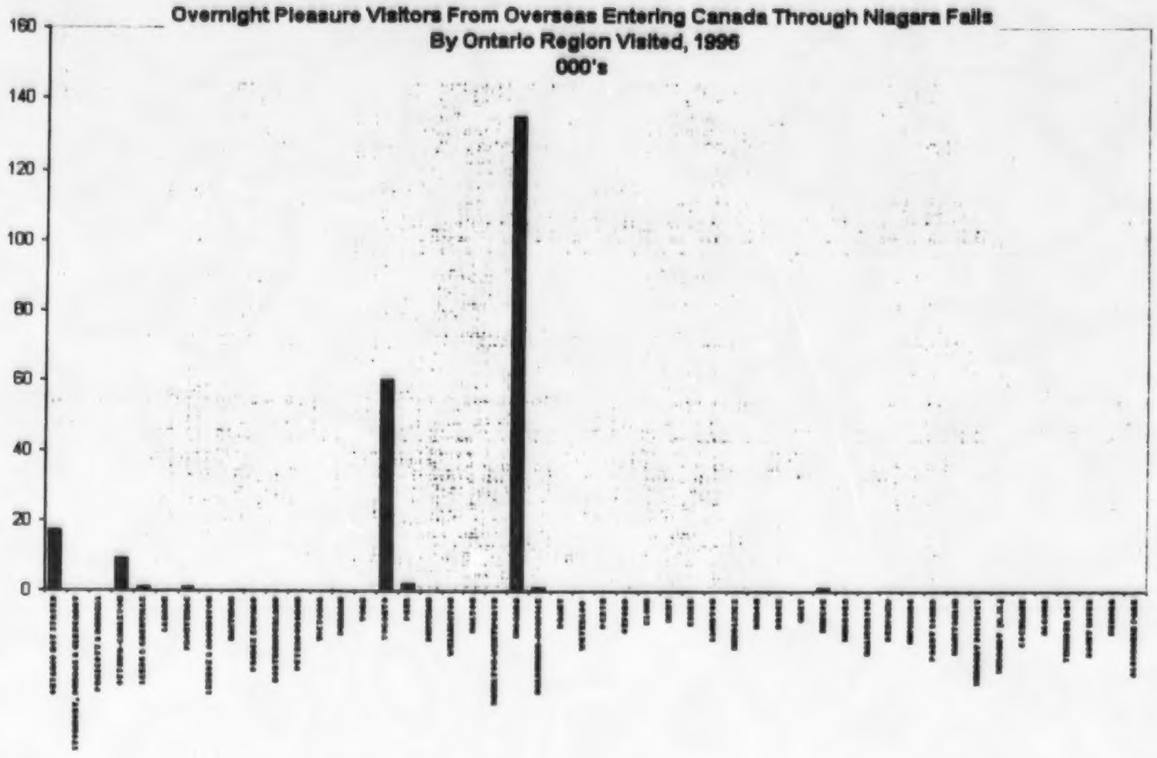

Overnight Pleasure Visitors From Overseas Entering Canada Through Toronto
By Ontario Region Visited, 1996
000's

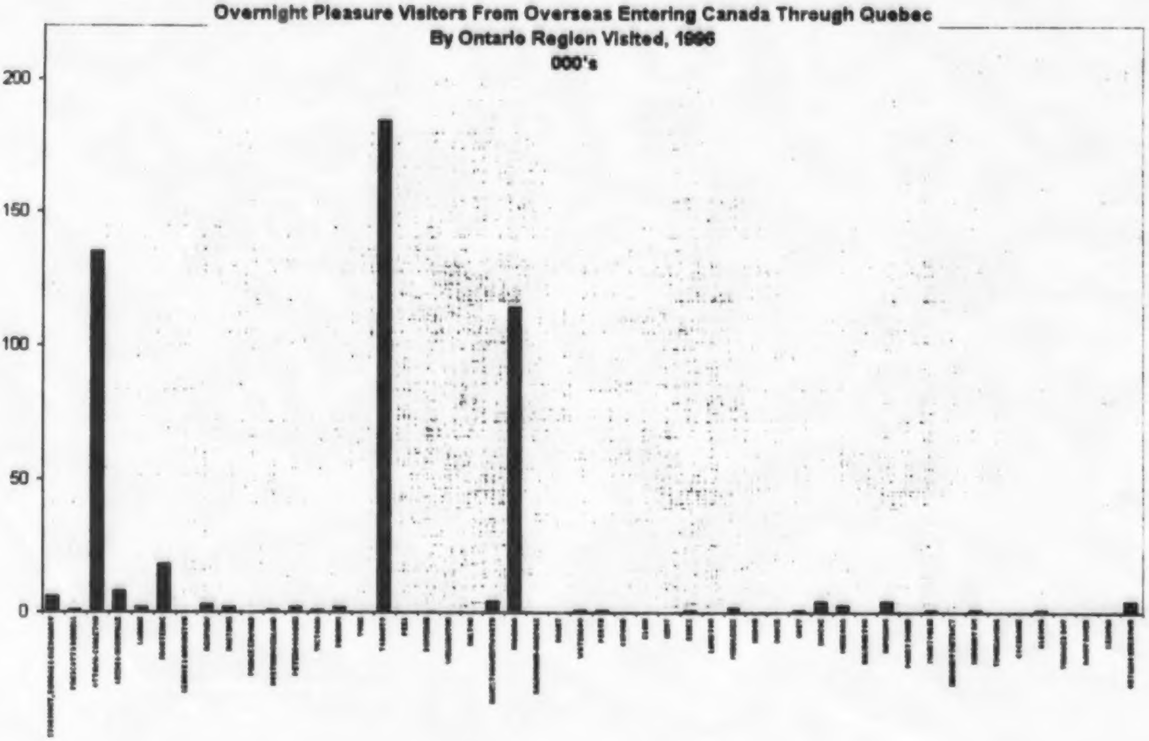
Niagara Falls Of the total number of overnight pleasure visitors from overseas countries who entered Canada through the Niagara ports (186,000), 72.6% visited the Niagara region and 32.3% visited Toronto. Of those who visited Toronto (60,000), 41.7% visited only Metro. All other Ontario regions received minimal levels of visitation.

A total of 53.8% of the overseas who entered Canada through the Niagara ports for an overnight pleasure trip visited only the Niagara region. As such, the Niagara ports do not constitute an international gateway into Ontario for the overnight pleasure visitors from overseas countries. Since a majority, however, visited the region, Niagara is a destination region for these visitors.

The overnight pleasure visitors from overseas who entered Canada through the Niagara ports and visited the region (135,000) accounted for 30.9% of Niagara's total overnight pleasure visits from overseas, while those who visited Toronto accounted only for 8.5% of Toronto's total overnight pleasure visitors from overseas. As such, the Niagara ports do not play an important role for Toronto's overnight pleasure market from overseas.

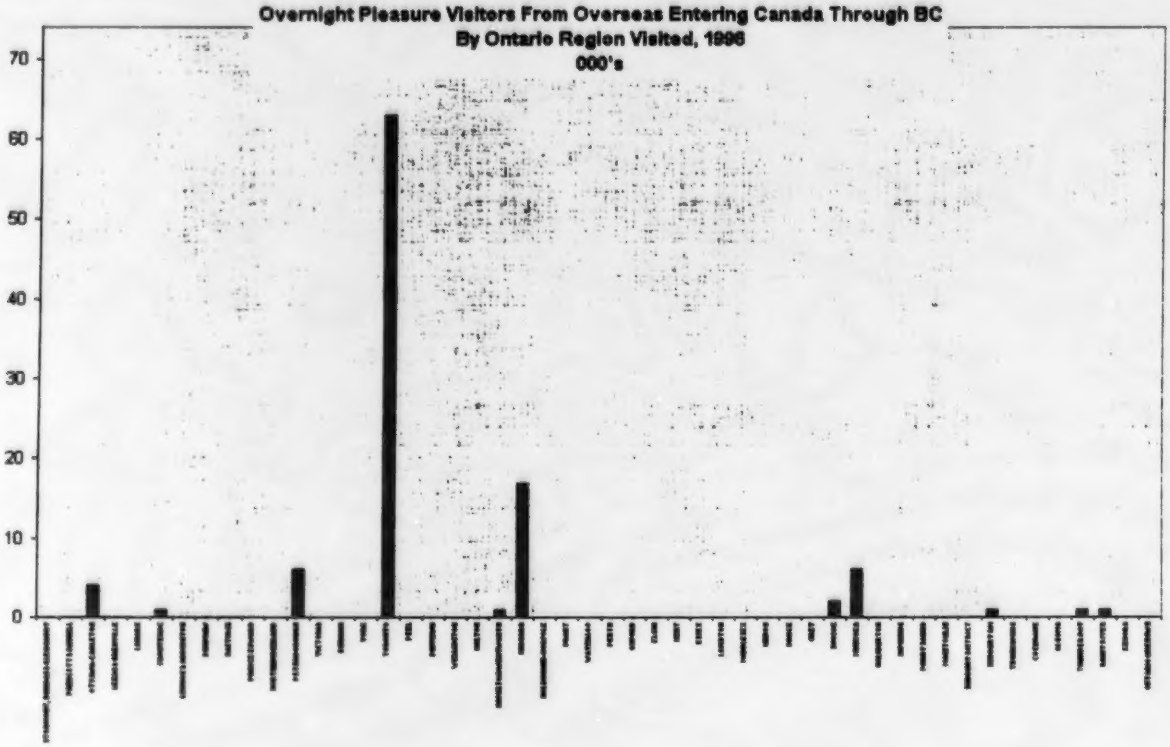
Quebec Of the overnight pleasure visitors from overseas countries who entered Canada through Quebec ports and visited Ontario (243,000), 76.1% visited Toronto, 55.6% visited Ottawa-Carleton, 46.9% visited the Niagara region and 7.4% visited Frontenac. All other Ontario regions received minimal levels of visitation. Of those who visited Toronto (185,000), 23.8% visited only Metro.


Overnight Pleasure Visitors From Overseas Entering Canada Through Niagara Falls
By Ontario Region Visited, 1996
000's
160
140
120
100
80
60
40
20
0


Overnight Pleasure Visitors From Overseas Entering Canada Through Quebec
By Ontario Region Visited, 1996
000's
200
150
100
50
0

These visitors played a significant role in each of the three main Ontario regions visited as they accounted for 26.4% of Toronto's total overnight pleasure visitors from overseas, for 49.3% of Ottawa-Carleton's and for 26.1% of the Niagara region's.

Only 6,000 of these visitors (or 2.5%) visited the Ontario region of entry (Stormont/Prescott), indicating that this region is not a destination area for these visitors.



Overnight Pleasure Visitors From Overseas Entering Canada Through BC
By Ontario Region Visited, 1996
000's

BC Of the overnight pleasure visitors from overseas countries who entered Canada through Quebec ports and visited Ontario (71,000), 88.7% visited Toronto and 23.9% visited the Niagara region. Of those who visited Toronto (63,000), 61.9% visited only Metro and no other Ontario region. All other Ontario regions received minimal levels of visitation.

These visitors played a minor role in each of the main Ontario regions visited (they accounted for 8.9% of Toronto's overnight pleasure visitors from overseas and for 3.9% of Niagara's).

Conclusions:

- The overnight pleasure visitors from overseas countries who entered Canada through Ontario's ports and visited the province accounted for 69.9% of Ontario's total overnight pleasure visitors from overseas.
- Of the remaining overnight pleasure visitors from overseas (30.1%) who visited Ontario, 21.9% entered Canada through Quebec, 6.4% through BC, and 1.8% through other Canadian provinces.

- For the overnight pleasure visitors from overseas who entered Canada through Ontario's ports in 1996, there were two provincially significant ports: Toronto and Niagara Falls, accounting for 85.4% (Toronto 62.7% and Niagara Falls 22.8%) of these visitors.

	OVERNIGHT PLEASURE VISITORS FROM OVERSEAS, 1996			
Name of Provincial Entry Point	**Significant Port?**	**Significant Visits to other Ontario Regions?**	**Significant Destination?**	**Gateway?**
Overnight Pleasure Visitors From Overseas Entering Canada Through Ontario Ports				
Toronto	**Yes at the provincial level** (processed 42.7% of Ontario's overnight pleasure visitors from overseas)	**Yes** (67.6% visited other Ontario regions)	**Yes** (66.8% visited Toronto)	**Yes**
Niagara Falls	**Yes at the provincial level** (processed 16.5% of Ontario's overnight pleasure visitors from overseas)	No (only 46.2% visited other Ontario regions)	**Yes** (72.6% visited the Niagara region)	**No**
Overnight Pleasure Visitors From Overseas Entering Canada Through Non-Ontario Ports				
Prescott/ Stormont	**Yes at the provincial level** (processed 19.8% of Ontario's overnight pleasure visitors from overseas)	**Yes** (at least 97.3% visited other Ontario regions)	No (only 2.7% visited the area)	**No**
Toronto	No (processed only 8.3% of these Ontario visitors)	No (only 33.7% visited other Ontario regions)	**Yes** (100% visited Toronto)	**No**
All Overnight Pleasure Visitors From Overseas Entering Canada Through All Ports				
Toronto	**Yes** (processed 51.0% of Ontario's overnight pleasure visitors from overseas)	**Yes** (62.4% visited other regions)	**Yes** (71.9% visited Toronto)	**Yes**
Prescott/ Stormont	**Yes** (processed 19.8% of Ontario's overnight pleasure visitors from overseas)	**Yes** (at least 97.3% visited other Ontario regions	No (only 2.7% visited the area)	**No**
Niagara Falls	**Yes at the provincial level** (processed 16.7% of Ontario's overnight pleasure visitors from overseas)	No (only 46.2% visited other Ontario regions)	**Yes** (72.6% visited the Niagara region)	**No**

- The majority of the overnight overseas visitors (57.9% overall) who entered Canada through Ontario's ports while on a pleasure trip, visited only one county/district. On average these visitors visited 1.61 Ontario counties, while those who had a visit in the province visited on average 1.70

counties. These averages are higher than the overall overnight US visitors who entered Canada through the Ontario ports while on a pleasure trip (1.16 counties for all entrants and 1.20 for those with a visit in the province).

- Of the overnight pleasure visitors from overseas who visited Ontario but entered Canada through a non-Ontario port, the majority visited two or more counties (57.2%). Overall, the average number of Ontario regions visited by these visitors was 2.9.

- The overnight pleasure visitors from overseas who entered Canada through Toronto' ports played an important role in the Niagara region's total overnight pleasure visitors from overseas (30.2%), Ottawa's (36.5%), Northern Ontario's (45.2%), as well as Toronto's (48.7%).

- The majority of the UK overnight pleasure visitors (69.0%) who visited Ontario entered Canada through Toronto, the majority of the equivalent French visitors (68.4%) entered Canada through Quebec, while the majority of the equivalent German visitors (64.8%) entered Canada through Toronto. The largest proportion of Ontario's overnight pleasure visitors from Japan (36.9%) entered Canada through Niagara Falls.

- In addition to the overnight pleasure market from France, Quebec played an important role in the European market as well in markets other than Europe and Asia.

- Niagara, Toronto and Ottawa are the only regions with significant visitation levels irrespective the provincial point of entry. These non-neighbouring regions appear to form a virtual travel region, while all other travel regions do not appear to be very relevant as far as the overnight pleasure visitors and their overnight excursions are concerned.

- There does not appear to be a relationship between gateways/non-gateways and average length of stay in Ontario, while the relationship between number of regions visited and average length of stay is not very strong here as it was for the overall overseas visitors, especially for Toronto.

C. Overnight Travel Regions

As it was shown in the previous two sections of this report, each of Ontario's travel markets is sufficiently different, in terms of the places visited, that a separate examination of each one of them is warranted. This section will examine the Ontario market, the Quebec market, the western Canada market, the Atlantic Canada market, the Manitoba market, the US market and the overseas market separately in order to ascertain which Ontario regions constitute an overnight travel region for each of these markets.

As indicated earlier, the data presented here do not include same day excursions because they were not available for the domestic and international markets in 1996 (they will be available for the international markets in 1998). As such, if some regions do not constitute an overnight travel region, then that does not necessarily mean that they do not also constitute a travel region. Some regions may in fact act as regional centres whereby nearby regions are reached for same day excursions thus enhancing the appeal of the destination region. However, given the size of most Ontario's counties, it would appear that the introduction of same day excursions would affect mainly Toronto and Niagara Falls.

The domestic data in this section pertain to the trips taken to a region as a destination and the subsequent visits to other regions as overnight excursions. Unfortunately, this information is not available in the International Travel Survey and as such we do not know whether region A was the destination with regions B and C as overnight excursions or vice-a-versa.

C.1. The Overnight Ontario Residents Market

In 1996, there were 18 Ontario counties/districts that received, as destinations, over 500,000 overnight visitors from Ontario. These counties/districts accounted for 68.7% of the overnight visits with known destinations generated by the Ontario residents in the province. These 18 regions with the addition of Sudbury RM, Algoma and Thunder Bay cover the whole of Ontario and accounted in 1996 for 73.2% of Ontarians' overnight visits in Ontario with known destination.

These 21 regions will form the basis around which the travel regions relevant for Ontario residents will be built. They are: Metro Toronto, Simcoe, Ottawa-Carleton, Muskoka, Niagara, Middlesex, Peterborough, Bruce, Parry Sound, Hastings, Frontenac, Waterloo, Essex, Renfrew, Haliburton, Durham, Nipissing, Lambton, Sudbury RM, Algoma and Thunder Bay.

The data in the graphs that follow have been arranged to show the Ontario regions visited by Ontarians who took a trip with a destination in the region under consideration. These regions visited have are grouped in terms of their proximity to a notional line going through the destination region under consideration.

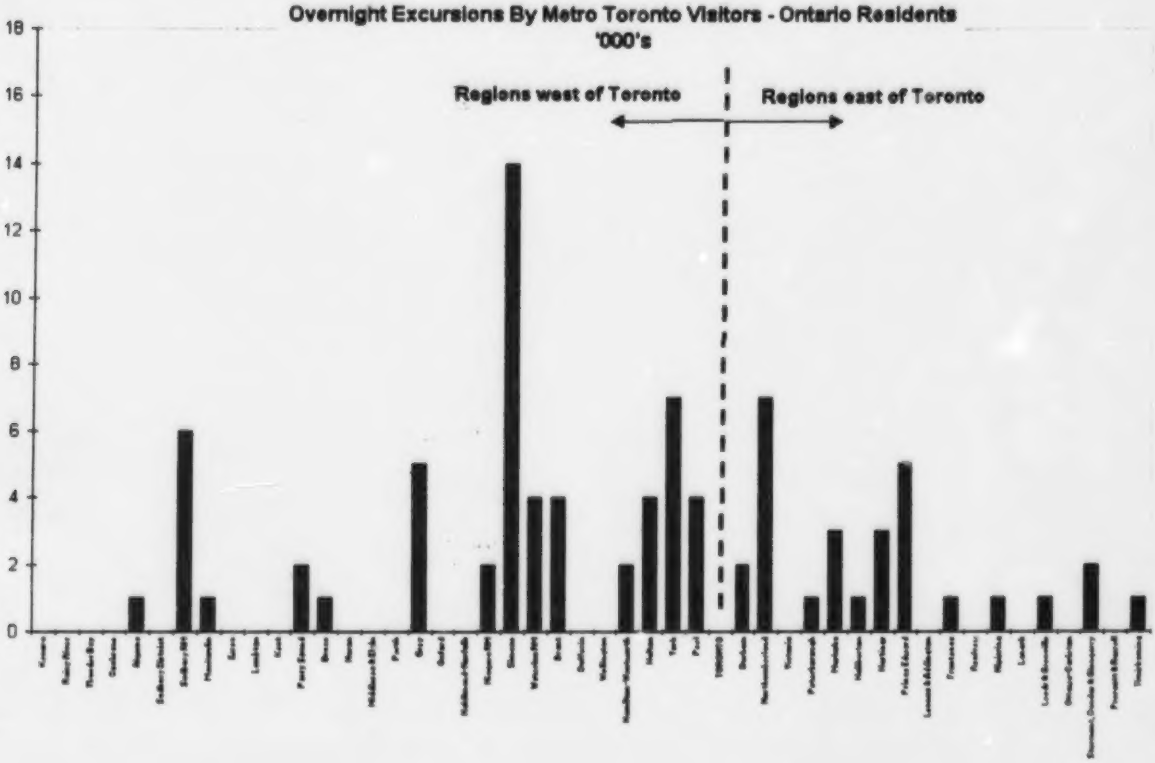
The table below shows the number of visitors from Ontario who were destined to each one of these 21 regions and the number of visitors who took overnight excursions to other Ontario regions. As the table indicate, the number of visitors who took overnight excursions varied from 0.7% to 5.4%. As such we are only going to take a closer look at the top 5 regions and the regions that exhibit a high percentage of excursions (4% or higher). In particular, Toronto, Simcoe, Ottawa-Carleton, Muskoka, Niagara, Nipissing, Thunder Bay and Essex.

Ontario Residents On Overnight Trips In Ontario, 1996				
Name Of County/District	Number Of Overnight Visits With A Destination In...	Number Of Visitors Who Took Overnight Excursions To Other Ontario Regions	Number of Additional Regions Visited	Overnight Excursions As A % Of Total Overnight Destination Visits
Toronto	3,025,000	60,000	26	2.0%
Simcoe	2,267,000	25,000	10	1.1%
Ottawa-Carleton	1,431,000	50,000	10	3.5%
Muskoka	1,360,000	11,000	5	0.8%
Niagara	1,029,000	39,000	16	3.8%
Middlesex	942,000	12,000	8	1.3%
Peterborough	898,000	3,000	2	0.3%
Bruce	795,000	16,000	11	2.0%
Parry Sound	753,000	11,000	2	1.5%
Hastings	743,000	15,000	8	2.0%
Frontenac	731,000	21,000	8	2.9%
Waterloo	636,000	9,000	4	1.4%
Essex	625,000	34,000	10	5.4%
Renfrew	617,000	12,000	6	1.9%
Haliburton	598,000	4,000	2	0.7%
Durham	561,000	5,000	4	0.9%
Nipissing	522,000	23,000	5	4.4%
Lambton	522,000	20,000	5	3.8%
Sudbury RM	419,000	14,000	8	3.3%
Algoma	393,000	14,000	5	3.6%
Thunder Bay	354,000	18,000	7	5.1%

Toronto Of the overnight visitors from Ontario with Metro Toronto as the destination of their trip (3.025 million), 60,000 took overnight excursions to 26 Ontario counties in 1996.

Although these excursions varied from Algoma, to Stormont & Dundas, to Niagara, they only represented 2.0% of Metro's total overnight visits taken by Ontarians with a destination in Metro. These 60,000 visitors took a total of 85,000 overnight excursions to other Ontario regions. In other words, each of these 60,000 visitors visited, on an overnight basis, an additional 1.42 Ontario counties.

The average distance travelled by Ontario residents destined to Toronto for an overnight stay was 251 Kms, while the median distance travelled was 191 Kms. These figures imply that the Ontario visitors to Toronto crossed on average 1.6 counties plus their own in order to get there. The longest distance travelled was over 1,600 Kms (these long-haul trips accounted for 0.2% of the overnight trips to Toronto from Ontario).



The county that received the largest share of these overnight excursions was Simcoe (receiving 14,000 visits representing 0.5% of Toronto's and 0.6% of Simcoe's overnight visitors from Ontario), followed by Northumberland and York (7,000 visits each). These data indicate that as far as the Ontario residents are concerned, the interaction between Toronto and other counties is minimal.

Of Toronto's total overnight visitors from Ontario (excluding visitors from Toronto itself), 57.4% came from what we define here as a region west of Toronto, and these counties accounted for 67.1% of the overnight excursions by Ontario visitors who took a trip to Toronto as a destination.

This observation combined with the fact that a) most of these overnight excursions from Toronto were small and b) that over 70% of the Ontario residents visiting Toronto did so by car (over 80% use car/train/bus), imply that many of these overnight excursions were stops from one's place of residents to Toronto or vice-a-versa.

Ottawa was the largest single source of trips to Toronto, accounting for 13.5% of Ontarians' trips with a Toronto destination, followed by Middlesex (8.9%), Durham (6.1%), Waterloo (4.2%), Simcoe (3.9%) and

Frontenac (3.6%).

Simcoe Of the overnight visitors from Ontario with Simcoe as the destination of their trip (2.267 million), 25,000 took overnight excursions to 10 Ontario counties in 1996. Although these visitors' excursions took them from Frontenac, to Parry Sound, these visitors accounted for only 1.1% of the Ontario residents who took an overnight trip with a destination in Simcoe.

These 25,000 visitors generated 26,000 overnight visits to other Ontario counties.

Toronto received the largest share of these visits (19.2% or 5,000), followed by Frontenac (5,000) and Bruce (15.4% or 4,000). Other regions received minimal levels of visitation.

The largest sources of Ontario visitors who took a trip with a destination in Simcoe were Toronto (27.9%), Peel (15.4%) and Simcoe (8.7%).

These statistics show that as far as the overnight Ontario residents are concerned, there is no significant interaction between Simcoe and other Ontario counties.

Ottawa-Carleton Of the overnight visitors from Ontario with Ottawa as the destination of their trip (1.431 million), 50,000 took overnight excursions to 10 Ontario counties in 1996.

Although these excursions varied from Frontenac, to Sudbury to Wellington, they only represented 3.5% of Ottawa's total overnight visits taken by Ontarians with a destination in Ottawa. These 50,000 visitors generated 51,000 overnight visits to other Ontario counties.

Frontenac received the largest share of these visits (46.0% or 23,000 visits), with other regions receiving minimal visitation levels. These 23,000 visits to Frontenac represented 2.9% of the county's total overnight visits from Ontario. The region comprising Stormont, Dundas & Glengarry, Frontenac and Leeds & Grenville received 29,000 of these visits.

The largest sources of Ontario visitors who took a trip with a destination in Ottawa-Carleton were Toronto (16.4%), Ottawa-Carleton (12.9%) and Frontenac (9.4%).

Although the above statistics suggest some interaction between Ottawa-Carleton and Frontenac, this interaction a) is minimal (accounting for 1.6% of Ottawa-Carleton's total overnight visitors from Ontario with a destination in Ottawa-Carleton and 2.9% of Frontenac's total overnight visits from Ontario), and b) does not hold in reverse, i.e., the number of overnight excursions to Ottawa-Carleton by Ontarians who were destined to Frontenac was insignificant (only 1,000 visits).

Muskoka Of the overnight visitors from Ontario with Muskoka as the destination of their trip (1.36 million), 11,000 took overnight excursions to 5 Ontario counties in 1996.

These excursions represented 0.8% of Muskoka's total overnight visits taken by Ontarians with a destination in Muskoka. These 11,000 visitors generated 12,000 visits to other Ontario counties.

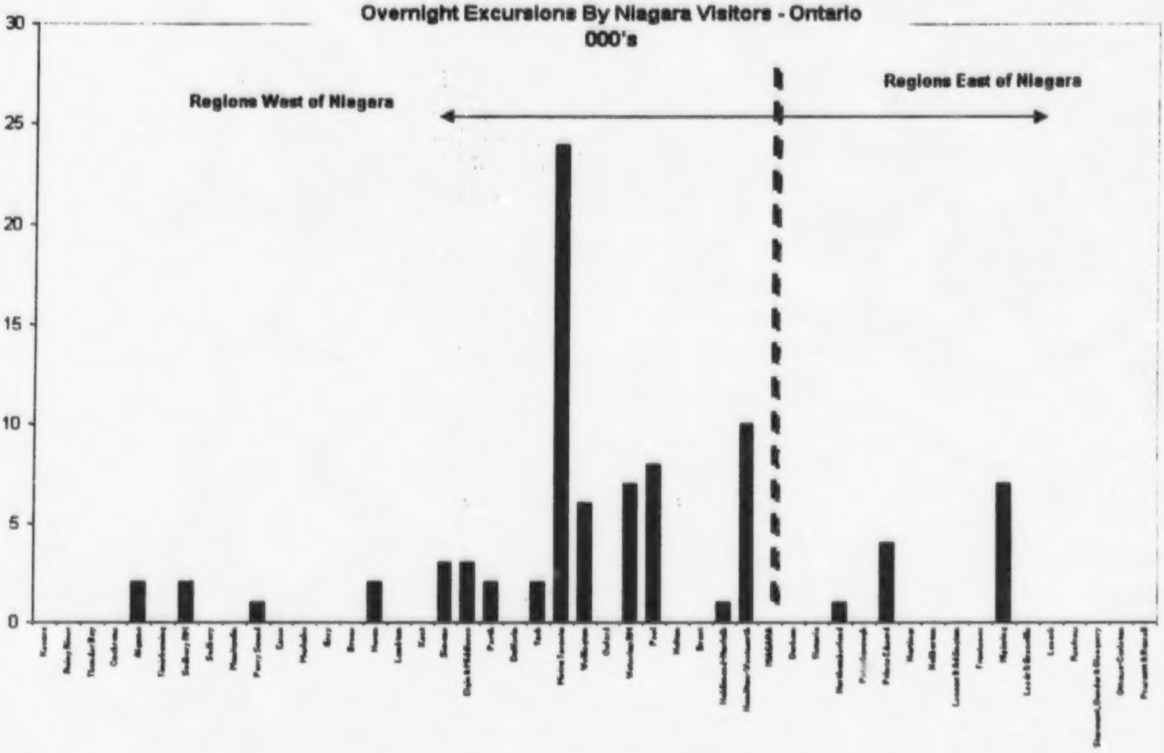
Toronto and Peterborough received the largest share of these visits (3,000, or 25%, each).

The largest sources of Ontario visitors who took a trip with a destination in Muskoka were: York (24.3%), Toronto (17.7%), Peel (11.6%) and Simcoe (8.2%).

These statistics suggest that Muskoka is a travel region on its own right as far as the overnight Ontarians are concerned.

Niagara Of the Ontarians who took an overnight trip with a destination in the Niagara region (1.029 million), 39,000 took overnight excursions to 16 Ontario counties/districts.

Although these visitors' excursions varied from Algoma, to Middlesex, to Prince Edward county, these visitors represented only 3.8% of the total visits taken by Ontario residents with a destination in the Niagara region. These 39,000 visitors generated 66,000 overnight visits to other Ontario counties.



The average distance travelled by Ontarians on an overnight trip to the Niagara area was 203 Kms and the median 171 Kms. These figures imply that on average, an Ontario resident on a trip to Niagara region crossed 1.2 counties plus their own in order to get there. The longest distance travelled was over 1,600 Kms (1,000 trips or 0.1% of Niagara's total overnight trips from Ontario).

The region that received the largest share of these overnight excursions was Toronto (receiving 22,000 visits representing 2.0% of Niagara's and 0.7% of Toronto's overnight visits from Ontario), followed by Hamilton-Wentworth (10,000 visits or 1.6% of Hamilton's overnight visits from Ontario) and Nipissing (7,000 visits). It is worth noting that the narrow corridor from Niagara to Toronto (Toronto, Peel, Halton, Hamilton-Wentworth) received 53.0% of these overnight excursions.

Of Niagara's total overnight visitors from Ontario, 79.9% came from what we define here as a region west of Niagara, and these counties accounted for 81.8% of the overnight excursions by Ontario visitors who took a trip to Niagara as a destination.

The largest sources of Ontarians' trips to Niagara as a destination were Toronto (15.7%), Peel (9.4%) and Middlesex (6.8%).

Although the above statistics suggest some interaction between Niagara and Toronto, this interaction a) is minimal (accounting for 2.0% of Niagara's total overnight visitors from Ontario with a destination in Niagara and 0.7% of Toronto's total overnight visits from Ontario), and b) does not hold in reverse, i.e., the number of overnight excursions to Niagara by Ontarians who were destined to Toronto was insignificant (only 2,000 visits).

Essex Of the overnight visitors from Ontario with Essex as the destination of their trip (0.625 million), 34,000 took overnight excursions to 10 Ontario counties in 1996.

The visitors who took these excursions accounted for 5.4% of Essex's total overnight visits taken by Ontarians with a destination in Essex. These 34,000 visitors generated 40,000 visits to other Ontario regions.

Lambton received 15,000 (or 37.5%) of these overnight excursions (representing 2.7% of Lambton's total overnight visits from Ontario), followed by Toronto (7,000 overnight excursions or 17.5%) and Oxford (6,000 overnight excursions or 15.0%), with all other regions receiving minimal visitation levels. The region comprising Oxford, Elgin, Kent, Lambton and Middlesex received 26,000 of these overnight excursions, or 65.0% of the total, representing 1.2% of this region's total overnight visits from Ontario and 4.2% of Essex's overnight visitors from Ontario with a destination in Essex.

The largest sources of Ontario visitors who took a trip with a destination in Essex were Toronto (17.9%), Middlesex (16.3%) and Essex (11.7%).

Although the above statistics suggest some interaction between Essex and Lambton, this interaction a) is minimal(accounting for 2.4% of Essex's total overnight visitors from Ontario with a destination in Essex and 2.7% of Lambton's total overnight visits from Ontario), and b) does not hold in reverse, i.e., the number of overnight excursions to Essex by Ontarians who were destined to Lambton were non-existent in 1996.

Nipissing Of the overnight visitors from Ontario with Nipissing as the destination of their trip (0.522 million), 23,000 took overnight excursions to 5 Ontario counties in 1996.

The visitors who took these excursions accounted for 4.4% of Nipissing's total overnight visits taken by Ontarians with a destination in Nipissing. These 23,000 visitors generated 23,000 visits to other Ontario regions.

Haliburton received 52.4% of these overnight excursions (representing 2.0% of Haliburton's total overnight visits from Ontario) and Muskoka received 28.6%. Both of these regions are the immediate neighbours of Nipissing, and in particular of the Algonquin Park that lies in the southern portion of Nipissing.

The largest sources of Ontario visitors who took a trip with a destination in Nipissing were Sudbury RM (13.0%), Toronto (9.2%) and Simcoe (8.8%). It is interesting to note that the top three regions of origin for overnight visitors to Nipissing accounted only for 31.0% of the region's total overnight visitors originating in Ontario and destined to Nipissing.

Thunder Bay Of the overnight visitors from Ontario with Thunder Bay as the destination of their trip (0.354 million), 18,000 took overnight excursions to 7 Ontario counties in 1996.

The visitors who took these excursions accounted for 5.1% of Thunder Bay's total overnight visits taken by

Ontarians with a destination in Thunder Bay. These 18,000 visitors generated 26,000 visits to other Ontario regions.

Algoma received 23.1% of these overnight excursions (representing 1.3% of Algoma's total overnight visits from Ontario) and Sudbury RM received 19.2%. It is interesting to note here that in addition to the 26,000 excursions to Ontario regions these visitors also took 13,000 excursions to the US and that the interaction with Algoma is one-way in the sense that the overnight visitors from Ontario who were destined to Algoma did not take any overnight excursions to Thunder Bay.

The largest sources of Ontario visitors who took a trip with a destination in Thunder Bay were the District itself (59.9%), Rainy River (8.2%) and Toronto (4.2%).

Conclusions

- Overall, each of Ontario's counties/district is an overnight travel region on its own right as far as the overnight visitors from Ontario are concerned.
- An argument could be made that for this market, and at the margin, Frontenac enhances the appeal of Ottawa-Carleton, Toronto enhances the appeal of Niagara, Lambton enhances the appeal of Essex and Haliburton that of Nipissing.

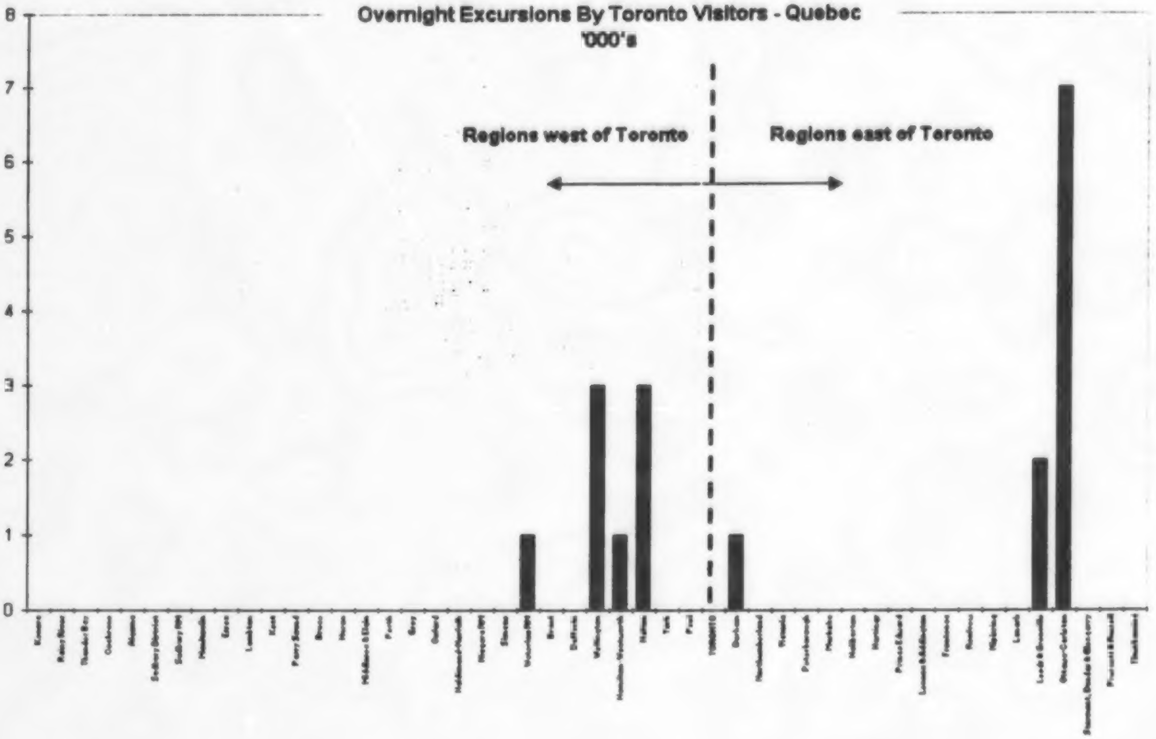
C.2. The Overnight Quebec Residents Market

In 1996, 8 Ontario regions accounted for 84% of the overnight trips from Quebec to Ontario. These regions were: Toronto, Ottawa-Carleton, Frontenac, Stormont, Dundas & Glengarry, Niagara, Renfrew, Prescott & Russell and Leeds & Grenville.

Quebec Residents On Overnight Trips To Ontario, 1996

Name Of County/District	Number Of Overnight Visits With A Destination In...	Number Of Visitors Who Took Overnight Excursions To Other Ontario Regions	Number of Additional Regions Visited	Overnight Excursions As A % Of Total Overnight Destination Visits
Toronto	510,000	15,000	6	2.9%
Ottawa-Carleton	470,000	2,000	1	0.4%
Frontenac	65,000	-	0	0.0%
Stormont, et all	53,000	-	0	0.0%
Niagara	41,000	4,000	3	9.8%
Renfrew	36,000	-	0	0.0%
Prescott & Russell	25,000	-	0	0.0%
Leeds & Grenville	23,000	-	0	0.0%

The table below above the overnight visits originating in Quebec and destined to these 8 regions and the number of overnight excursions that the visits generated in Ontario. As it can be seen there, the only regions worth pursuing further are Toronto and Niagara.



Toronto Of the Quebec residents taking an overnight trip with Toronto as their destination, 15,000 took overnight excursions to an additional 6 Ontario counties. The visitors who took these overnight excursions accounted for 2.9% of Toronto's overnight visitors from Quebec who visited the region as a destination.

These 15,000 visitors generated 15,000 overnight excursions in Ontario. Forty seven per cent (46.7%) of these excursions (or 7,000 visits) occurred in Ottawa-Carleton RM, while all other Ontario regions received minimal levels of visitation. These 7,000 visits represented 1.4% of Toronto's total overnight visits from Quebec with a Toronto destination and 1.5% of Ottawa-Carleton's total overnight visits from Quebec.

In addition to the 7,000 visits to Ottawa-Carleton, 3,000 overnight visits occurred in a region between Toronto and Ottawa, bringing the total number of overnight excursions that occurred in a region between Toronto and the Quebec border to 66.7% of the total overnight excursions by Quebec residents with a destination in Toronto. It should be noted that 73.4% of the overnight trips from Quebec to Ontario used the automobile as a means of transportation, while 85% used either car, rail, bus or boat.

It is also interesting to note that of those Quebec residents who visited Toronto as a destination, 12,000 overnight excursions were taken to a province other than Ontario (most likely a place in Quebec, while driving to Toronto).

These statistics seem to indicate that Toronto is an overnight travel region on its own right as far as the Quebec residents are concerned.

Niagara Of the Quebec residents taking an overnight trip with Niagara as their destination, 4,000 took overnight excursions to an additional 3 Ontario counties. These 4,000 excursionists accounted for 9.8% of Niagara's total overnight visitors from Quebec destined to Niagara and generated 5,000 overnight visits to other Ontario regions. Toronto received 2,000 of these visits (representing 0.4% of Toronto's total overnight visits from Quebec) and Ottawa-Carleton received 2,000 as well (representing 0.4% of Ottawa-Carleton's total overnight visits from Quebec).

These statistics seem to indicate that Niagara is an overnight travel region on its own right as far as the Quebec residents are concerned.

Conclusions

- As far as the overnight Quebec market is concerned, every Ontario region is an overnight travel region on its own right.
- Some interaction, but minimal, does occur between Toronto, Ottawa and the Niagara region.

C.3. The Overnight Manitoba Market

In 1996, 5 Ontario regions accounted for 97.7% of the overnight trips from Manitoba to Ontario. These regions were: Kenora, Toronto, Thunder Bay, Ottawa-Carleton and Rainy River.

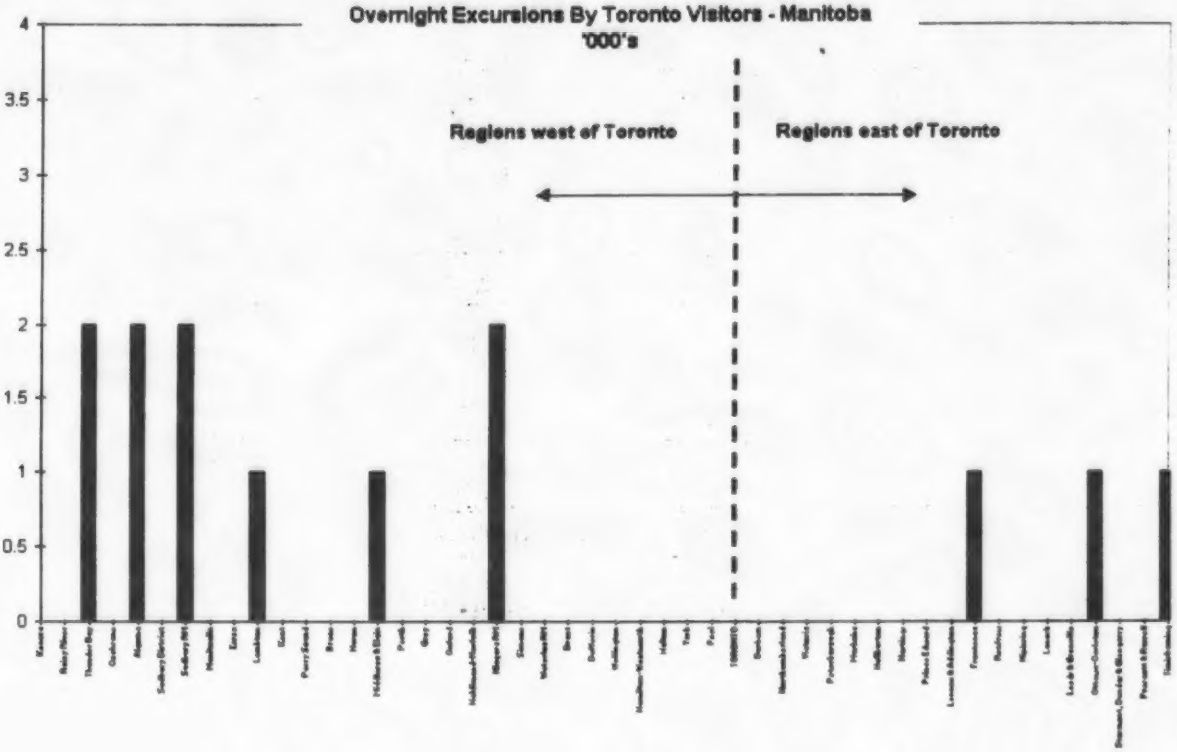
The table below shows the overnight visits originating in Manitoba and destined to these 5 regions and the number of overnight excursions that the visitors to each region generated in Ontario.

Manitoba Residents On Overnight Trips To Ontario, 1996

Name Of County/District	Number Of Overnight Visits With A Destination In...	Number Of Visitors Who Took Overnight Excursions To Other Ontario Regions	Number of Additional Regions Visited	Overnight Excursions As A % Of Total Overnight Destination Visits
Kenora	209,000	-	0	0.0%
Toronto	63,000	5,000	9	7.9%
Thunder Bay	36,000	4,000	3	11.1%
Ottawa-Carleton	25,000	4,000	2	16.0%
Rainy River	18,000	-	0	0.0%

As the table indicates, Kenora and Rainy River are travel regions on their own right, while Toronto, Thunder Bay and Ottawa-Carleton require a closer look.

Toronto Of the Manitoba residents on an overnight trip with a Toronto destination, 5,000 took overnight excursions to an additional 9 Ontario counties. These visitors accounted for 7.9% of Toronto's total overnight visitors from Manitoba with Toronto as their destination.



These 5,000 overnight excursionists generated 13,000 overnight visits to other Ontario regions. No Ontario region received more than 2,000 of these overnight excursions. Over half (53.8%) of these overnight excursions occurred along the corridor from Manitoba to Toronto (Thunder Bay, Sudbury RM, Algoma, Timiskaming), which imply that these are not overnight excursions but rather overnight stops on the way to Toronto/home.

It should be noted that 68.9% of the Manitoba overnight visitors to Ontario used the automobile as a means of getting around the province and 70.6% used either car or train or bus.

Thunder Bay Of the Manitoba residents on an overnight trip with a destination in Thunder Bay, 4,000 took overnight excursions to 3 other Ontario regions. These visitors accounted for 11.1% of Thunder Bay's total overnight visitors from Manitoba with the district as their destination.

These 4,000 visitors generated a total of 5,000 overnight excursions. Kenora received 3,000 (or 60.0%) of these excursions, representing 8.3% of Thunder Bay's overnight visits from Manitoba with a destination in Thunder Bay and 1.4% of Kenora's total overnight visits from Manitoba. Again, Kenora being between Manitoba and Thunder Bay, these overnight visits may be stops to and from Thunder Bay rather than pure overnight excursions.

Ottawa-Carleton Of the Manitoba residents on an overnight trip with a destination in Ottawa-Carleton, 4,000 took overnight excursions to 2 other Ontario regions. These visitors accounted for 16.0% of Ottawa-Carleton's total overnight visitors from Manitoba with the region as their destination.

These 4,000 visitors generated a total of 4,000 overnight excursions. Kenora received 3,000 (or 75.0%) of these excursions, representing 12.0% of Ottawa-Carleton's overnight visits from Manitoba with a destination in Ottawa-Carleton and 1.4% of Kenora's total overnight visits from Manitoba. Again, Kenora being between Manitoba and Ottawa-Carleton, these overnight visits may be stops to and from Ottawa-Carleton rather than pure overnight excursions. The remaining 1,000 overnight excursions occurred in Toronto, which again may be on the way to Ottawa either by air or by car.

Conclusions

- As far as the overnight Manitoba market is concerned, every Ontario region is an overnight travel region on its own right.
- Some interaction, but minimal, does occur between Thunder Bay and Kenora, however this interaction is one-way, that is, it is the visitors to Thunder Bay that take excursions to Kenora and not the other way around.

C.4. The Overnight Atlantic Canada Market

In 1996, 5 Ontario regions accounted for 87.6% of the overnight trips from Atlantic Canada to Ontario. These regions were: Toronto, Ottawa-Carleton, Niagara, Peel and Simcoe.

The table below shows the overnight visits originating in Atlantic Canada and destined to these 5 regions and the number of overnight excursions that the visitors generated in Ontario.

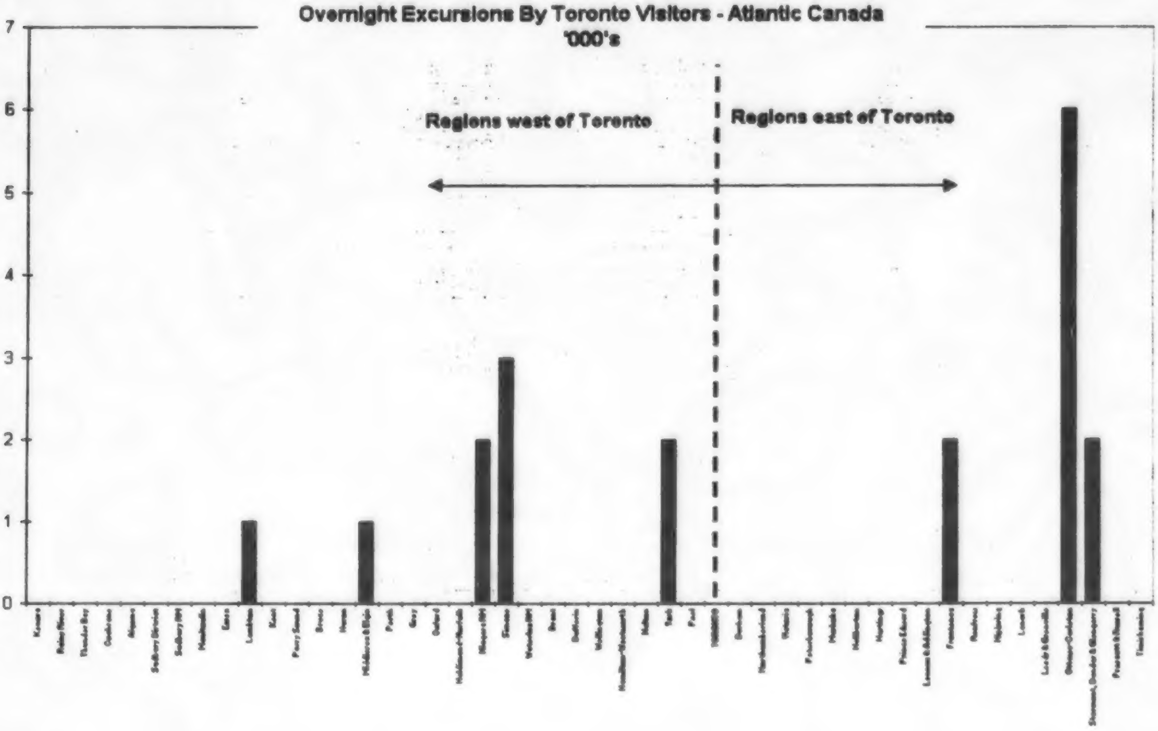
Residents Of Atlantic Canada On Overnight Trips To Ontario, 1996

Name Of County/District	Number Of Overnight Visits With A Destination In...	Number Of Visitors Who Took Overnight Excursions To Other Ontario Regions	Number of Additional Regions Visited	Overnight Excursions As A % Of Total Overnight Destination Visits
Toronto	138,000	19,000	9	13.8%
Ottawa-Carleton	78,000	2,000	1	2.6%
Niagara	10,000	6,000	5	60.0%
Peel	8,000	2,000	3	25.0%
Simcoe	6,000	1,000	2	16.7%

As the table indicates, Toronto and Niagara are the only regions that require a closer look.

Toronto Of the overnight visitors from Atlantic Canada who took a trip with Metro Toronto as their destination, 19,000 took overnight excursions to other Ontario regions. These visitors represented 13.8% of Toronto's total overnight visitors from Atlantic Canada who travel to Metro as their destination.

These 19,000 visitors generated 20,000 overnight visits to 9 additional Ontario regions. Ottawa-Carleton received 6,000 of these overnight excursions (representing 6.5% of Ottawa-Carleton's total overnight visits from Atlantic Canada and 4.3% of Toronto's), followed by Simcoe which received 3,000 (representing 23.1% of Simcoe total overnight visits from Atlantic Canada and 2.2% of Toronto's). The other 7 regions received minimal visitation levels.



Although these overnight excursions are small in volume, because the overall number of overnight visitors from Atlantic Canada is also small, they account for significant portions of the total visits to some regions. It would appear from the above statistics, that there is some justification in considering Toronto and Ottawa-Carleton as a potential virtual travel region for the overnight Atlantic Canada market.

Niagara Of the overnight visitors from Atlantic Canada who took a trip with a destination in the Niagara region, 6,000 took overnight excursions to other Ontario regions. These visitors represented 60.0% of Niagara's total overnight visitors from Atlantic Canada who travel to that region as their destination.

These 6,000 visitors generated 10,000 overnight visits to 5 additional Ontario regions. Peel received 3,000 of these overnight excursions (representing 23.1% of Peel's total overnight visits from Atlantic Canada and 30.0% of Niagara's), followed by York which also received 3,000 (representing 42.9% of York's total overnight visits from Atlantic Canada). The other 3 regions received minimal visitation levels.

Conclusions

- Although the regions Toronto-Simcoe-Ottawa-Carleton and Niagara-York-Peel appear to be important to each other as far as the Atlantic Canada visitors are concerned, and as such form virtual travel regions, this market is too small to warrant the creation of a travel region.

- In addition to the above regional interactions, Ottawa seems to enhance Toronto's appeal as far as the overnight visitors from Atlantic Canada are concerned.

C.5. The Overnight Western Canada Market

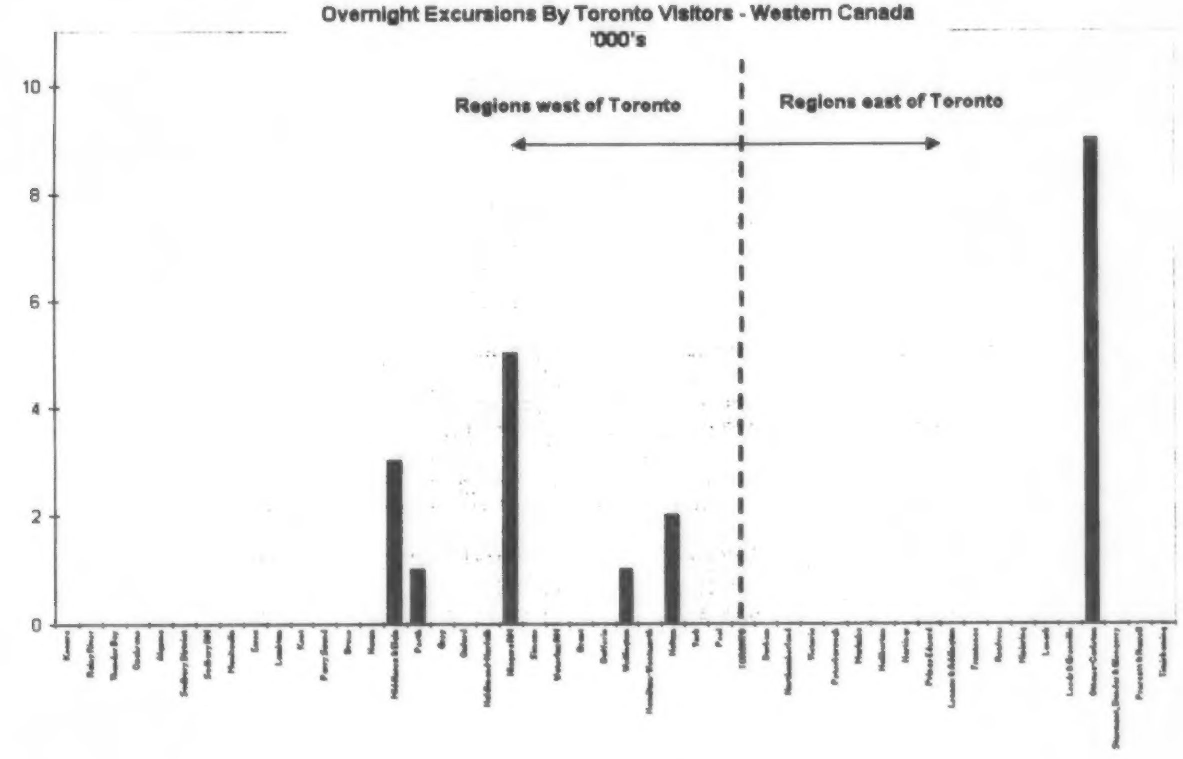
In 1996, 2 Ontario regions accounted for 72.5% of the overnight trips from Western Canada to Ontario. These regions were: Toronto and Ottawa-Carleton. All other Ontario regions received minimal levels of visitation.

The table below shows the overnight visits originating in western Canada and destined to these 2 regions and the number of overnight excursions that the visitors to each region generated in Ontario.

Residents Of Western Canada On Overnight Trips To Ontario, 1996

Name Of County/District	Number Of Overnight Visits With A Destination In...	Number Of Visitors Who Took Overnight Excursions To Other Ontario Regions	Number of Additional Regions Visited	Overnight Excursions As A % Of Total Overnight Destination Visits
Toronto	272,000	25,000	7	9.2%
Ottawa-Carleton	91,000	6,000	6	6.6%

Toronto Of the overnight visitors from western Canada (west of Manitoba) who took a trip with Metro Toronto as their destination, 25,000, or 9.2% of Toronto's total visitors from western Canada who visited Toronto as their destination, took overnight excursions to other Ontario regions.



These 25,000 visitors generated 27,000 overnight visits to an additional 6 know and 1 or more unknown Ontario regions. Of the known regions, Ottawa-Carleton received 9,000, or 33.3%, of these visits representing 3.3% of Toronto overnight visitors from Western Canada with a destination in Metro and 7.7% of Ottawa-Carleton's total overnight visits from western Canada.

Niagara RM received 5,000 of these overnight excursions, or 18.5%, representing 1.8% of Toronto's overnight visits from western Canada with a Toronto destination and 23.8% of Niagara's total overnight visits from western Canada. All other Ontario regions received minimal visitation levels.

Ottawa-Carleton Of the overnight visitors from western Canada (west of Manitoba) who took a trip with Ottawa-Carleton as their destination, 6,000, or 6.6% of Ottawa-Carleton's total visitors from western Canada who visited the region as their destination, took overnight excursions to other Ontario regions.

These 6,000 visitors generated 9,000 overnight visits to an additional 5 know and 1 or more unknown Ontario regions. All of these regions received minimal visitation levels with Stormont, Dundas & Glengarry receiving the highest share (3,000 visits).

Conclusions:

- Ottawa-Carleton appears to be enhancing Toronto's appeal to its overnight visitors from western Canada, although the reverse is not true.
- For those who visit Ottawa-Carleton as a destination, the region is a travel region on its own.

C.6. The Overnight US Market

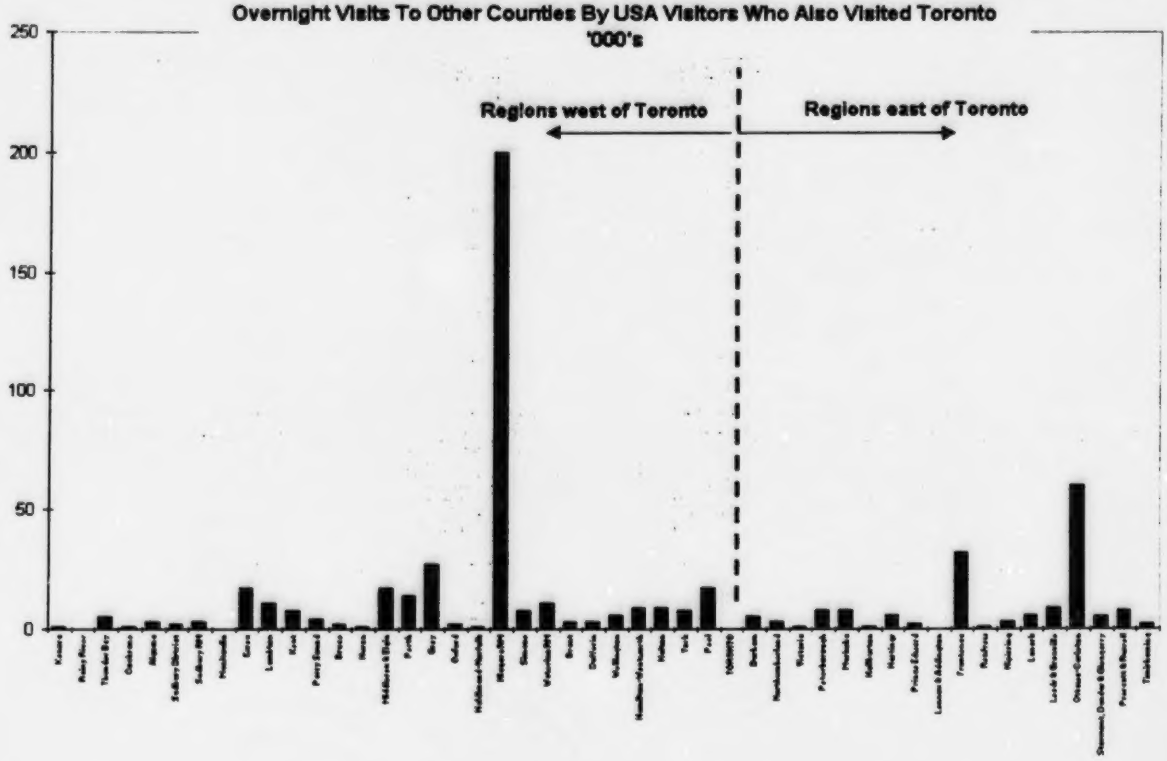
Of the total overnight visitors to Ontario from the US (6.788 million), 6.183 million, or 91.1%, had declared in 1996 the regions visited within Ontario. Eleven Ontario counties/districts accounted for 88.1% of those with a known region visited. These countries/districts were: Toronto, Niagara, Ottawa-Carleton, Essex, Algoma, Kenora, Thunder Bay, Leeds & Grenville, Perth, Frontenac and Middlesex.

Toronto Of the total US overnight visits to Metro Toronto (2.181 million), 1.746 million, or 80.1% visited only Toronto. The remaining 435,000 visitors to Toronto (or 19.9%) visited 44 Ontario counties and generated in the process 551,000 overnight visits to other Ontario regions. These numbers imply that the overnight US visitors who visited Toronto and one or more other Ontario regions, visited on average 2.27 Ontario regions (including Toronto).

Niagara RM received 36.3% of these overnight excursions (or 200,000), followed by Ottawa-Carleton (10.9%, or 60,000), Frontenac (5.8%) and Grey (4.9%). These excursions played an important role in determining the size of the overnight US market in many of Ontario's counties. For example, 15.9% of Ottawa's overnight US visitors, 13.8% of Niagara's, 19.8% of Frontenac's and 48.2% of Grey's had also visited Metro Toronto in 1996.

The overnight visits to Niagara, Essex, Lambton, Middlesex and Frontenac were most likely made by Americans on the way to Toronto/home rather than as "genuine" excursions after having arrived in Toronto. For example, of the 2,118,000 overnight US visitors who entered the province through a Niagara RM ports of entry, 720,000 (or 34.0%) visited Metro Toronto for an overnight stay. However, the opposite was not true. Of the 1.255 million of overnight US visitors who entered Ontario through the Toronto ports, only 47,000 (or 3.7%) visited Niagara RM for an overnight stay.

Similarly, only 0.2% of the overnight visitors who entered Ontario through Toronto took an overnight trip to Essex (Windsor), 0.2% took an overnight trip to Lambton (Sarnia) and 1.0% took an overnight trip to Middlesex (London). On the other hand, 29.6% of the overnight US visitors who entered the province through Windsor also visited Toronto for an overnight stay, 23.3% of those who entered through Sarnia visited Toronto and 6.5% of those who entered the province through one of the ports of entry in the Leeds & Grenville county (the eastern neighbour of Frontenac) also visited Metro for an overnight stay.



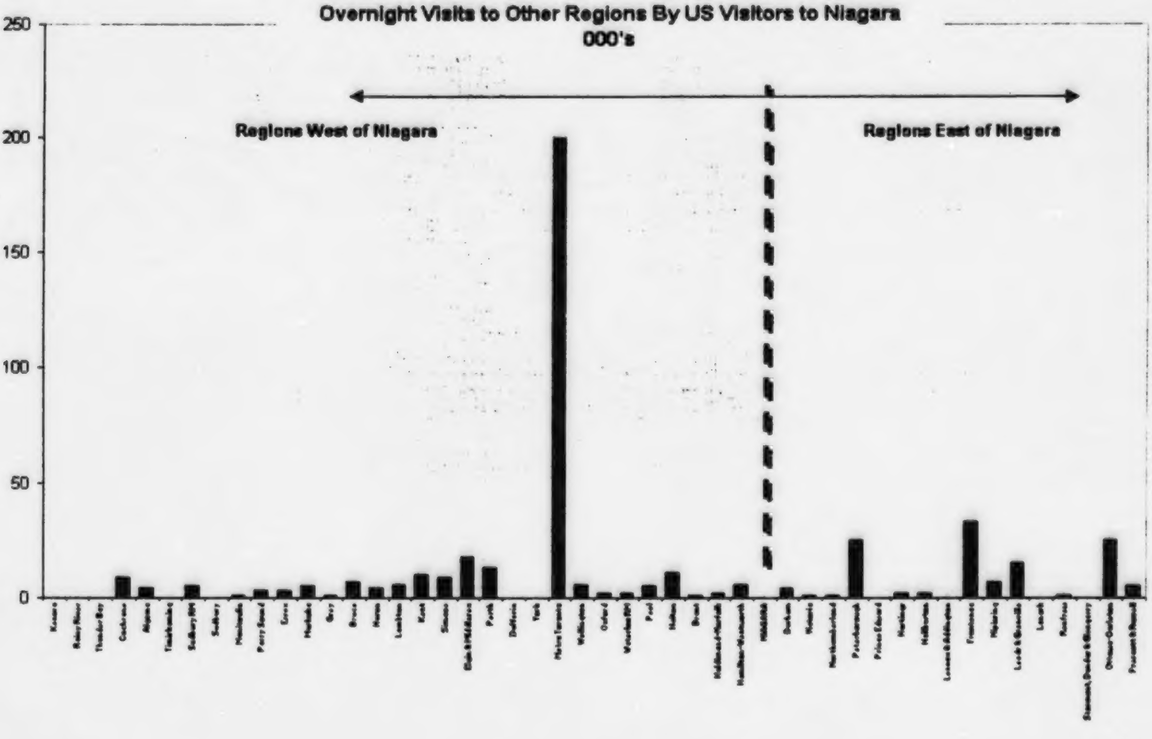
Some of the more "genuine" overnight excursions, although small in numbers, were those made by the US visitors to Grey, Simcoe, Muskoka and Ottawa-Carleton. For example, 2.4% (or 2,000 visitors) of the overnight US visitors who cleared customs at the Ottawa airport also visited Toronto for an overnight stay, while 2.6% (or 34,000 visitors) of the overnight US visitors who cleared customs at the Toronto airport also took an overnight excursion to Ottawa-Carleton. Grey, Simcoe and Muskoka are neither ports of entry nor on the way to a major port of entry to Canada.

Conclusions:

- As far as the overnight US visitors to Toronto are concerned, it appears that a number of Ontario regions enhance Toronto's appeal to these visitors. In particular Niagara, Ottawa-Carleton, Frontenac and Grey.
- Toronto does not seem to form in any significant way a region with any other neighbouring county. Some minimal interaction was observed with Durham, York and Peel counties. If there is any region that interacts with Toronto in a significant way then that's Niagara and Ottawa which form a virtual travel region with Metro.

- With the exception of Ottawa and Grey, many of the overnight excursions of the US overnight visitors to Toronto appear to be on the way to Toronto/home. As such, the corridors Niagara-Toronto, Windsor-Toronto, Sarnia-Toronto and to a lesser extent Ottawa-Leeds & Grenville-Toronto, are important in terms of enhancing and diversifying a US visitor's trip experience to Toronto.

- Toronto plays an important role in the size of the overnight US market for most of Ontario's regions.



Niagara Of the total US overnight visits to Niagara RM (1.452 million), 1.111 million, or 76.5% visited only the Niagara region. The remaining 341,000 visitors to Niagara (or 23.5%) visited 37 Ontario counties and generated in the process 456,000 overnight visits to other Ontario regions. These numbers imply that the overnight US visitors who visited Niagara and one or more other Ontario regions, visited on average 2.34 Ontario regions (including Niagara).

Toronto received 43.9% (or 200,000) of these overnight excursions, followed by Frontenac (7.2% or 33,000), Ottawa-Carleton (5.5% or 25,000), Peterborough (5.5% or 25,000) and Leeds & Grenville (3.3% or 15,000). These excursions accounted for 9.2% of Toronto's total overnight US visitors, for 20.4% of Frontenac's, for 6.6% of Ottawa', for 28.1% of Peterborough's and for 6.4% of Leeds & Grenville's.

The visits to Frontenac and Leeds & Grenville could have been made either on the way to Ottawa or on the way home after visiting Toronto. That is, a US visitor enters Ontario through a Niagara port, then continues to Toronto, then to Frontenac (Kingston) and then to Leeds & Grenville where he/she exits Canada to return home.

Conclusions:

- As far as the overnight US visitors to Niagara are concerned, it appears that Toronto is the main region that significantly enhances Niagara's appeal to these visitors. As indicated earlier, however, the opposite is not true. That is, only a small number of US overnight visitors who entered Canada through Toronto visited Niagara. As such, the region does not greatly enhance Toronto's appeal to these visitors.

- The Niagara-Toronto-Frontenac-Leeds & Grenville corridor appears to be an important touring corridor due, in part, to the Leeds & Grenville exit/entry points (Gananoque, Brockville, Prescott).

- Some minor opportunities appear to exist in diverting some of the traffic that moves along this corridor to visit Ottawa, as not all of the overnight US visitors who make it to Frontenac take the time to visit Ottawa-Carleton.

- The Niagara region appears to interact mainly with the Ontario regions that form OTAPs 4, 5 and 6.

Ottawa-Carleton Of the total US overnight visits to Ottawa-Carleton (0.377 million), 252,000, or 66.9% visited only Ottawa-Carleton. The remaining 125,000 visitors to Ottawa-Carleton (or 33.1%) visited 31 Ontario regions and generated in the process 193,000 overnight visits. These numbers imply that the overnight US visitors who visited Ottawa-Carleton and one or more other Ontario regions, visited on average 2.54 Ontario regions (including Ottawa-Carleton).

Toronto received 31.1% (or 60,000) of these overnight excursions, followed by Niagara (13.0% or 25,000), Frontenac (9.3% or 18,000), Leeds & Grenville (5.2% or 10,000), Nipissing (5.2% or 10,000, of which 5,000 occurred in Algonquin Park), Algoma (4.7% or 9,000) and Stormont, Dundas & Glengarry (3.6% or 7,000).

These overnight excursions accounted for 2.8% of Toronto's total overnight US visitors, for 11.1% of Frontenac's, for 1.7% of Niagara's, for 4.3% of Leeds & Grenville's, for 16.1% of Nipissing's, for 3.1% of Algoma's and for 8.4% of Stormont, Dundas & Glengarry's.

Although it appears that there is some interaction between Ottawa and Toronto, enhancing each other's appeal, this interaction is only one way. That is, only 2,000 US visitors who entered Canada through Ottawa visited Toronto, but of those who entered Canada through Toronto, 34,000 visited Ottawa-Carleton for an overnight stay (the remaining 24,000 US visitors who visited both Toronto and Ottawa-Carleton entered Canada through other Ontario ports, with Niagara Falls being the most important one).

Conclusions:

- As far as the overnight US visitors to Ottawa-Carleton are concerned, it appears that the region enhances Toronto's appeal to those visitors, however the opposite is not true. That is, only a small number of US overnight visitors who entered Canada through Ottawa-Carleton Toronto.

- The Ontario regions that benefit the most by the Americans who visited Ottawa-Carleton are those that contain international ports into Canada, such as Toronto, Leeds & Grenville, Frontenac, Stormont, Dundas & Glengarry and Niagara.

- Although Toronto, Ottawa and Niagara appear to form a virtual travel region for the overnight US visitors to Ontario, the impact that the Ottawa-Carleton visitors make to Toronto's and Niagara's total US visitation is insignificant.

Essex Of the total US overnight visits to Essex (0.454 million), 419,000, or 92.3% visited only Essex. The remaining 35,000 visitors to Essex (or 7.7%) visited 12 Ontario regions and generated in the process 45,000 overnight visits. These numbers imply that the overnight US visitors who visited Essex and one or more other Ontario regions, visited on average 2.29 Ontario regions (including Essex).

Toronto received 37.8% (or 17,000) of these overnight visits, followed by Middlesex (13.3%, or 6,000) and Hamilton-Wentworth (11.1% or 5,000). All other 9 regions received minimal visitation levels.

These overnight excursions accounted for 0.8% of Toronto's total overnight US visitors, 3.8% of Middlesex's, 4.1% of Hamilton-Wentworth's. Since Middlesex and Hamilton are on the Windsor-Toronto corridor, these overnight excursions could have been made by those who entered Windsor, visited the area and then moved on to visit Toronto.

Conclusions:

- As far as the overnight US visitors to Essex are concerned, it appears that the region is a travel region on its own right. Some minimal interaction exists between Essex and Toronto.

Algoma Of the total US overnight visits to Algoma (0.286 million), 211,000, or 73.8% visited only the Algoma region. The remaining 75,000 visitors to Algoma (or 26.2%) visited 23 other Ontario regions and generated in the process 99,000 overnight visits. These numbers imply that the overnight US visitors who visited Algoma and one or more other Ontario regions, visited on average 2.32 Ontario regions (including Algoma).

Victoria county and Thunder Bay each received 21.2% (or 21,000 each) of these "excursions", followed by Ottawa-Carleton (9.1% or 9,000). Other regions received minimal visitation levels.

The overnight excursions received by Thunder Bay accounted for 9.1% of the district's total overnight US visitors, while those received by Victoria accounted for 67.7% of the county's total overnight visitors from the US. These overnight excursions to Victoria were most likely incurred by US visitors entering Ontario through the Leeds & Grenville ports (there were 24,000 US visitors who entered Leeds & Grenville and visited Victoria and Algoma) and travelling to their destination in Algoma.

Conclusions:

- As far as the overnight US visitors to Algoma are concerned, it appears that to a large extent the region is a travel region on its own right. Some interaction exists between Algoma and Thunder Bay, while some other regions, in particularly Victoria, seem to act as resting places for these travellers while they are attempting to reach their destination/home.

Kenora Of the total US overnight visits to Kenora (0.208 million), 188,000, or 90.1% visited only the Kenora district. The remaining 20,000 visitors to Kenora (or 9.9%) visited 11 Ontario regions and generated in the process 24,000 overnight visits. These numbers imply that the overnight US visitors who visited Kenora and one or more other Ontario regions, visited on average 2.2 Ontario regions (including Kenora).

Rainy River received 29.2% (or 7,000) of these "excursions", followed by Thunder Bay (16.7% or 4,000). Other regions received minimal visitation levels.

The overnight excursions received by Rainy River accounted for 6.3% of the district's total overnight visitors from the US, and they accounted for 1.7% of Thunder Bay's total overnight US visitors.

Conclusions:

- As far as the overnight US visitors to Kenora are concerned, the region is a travel region on its own right. Some minimal interaction exists between Kenora and Rainy River, due primarily to the fact that the international ports of entry into Ontario are located in Rainy River.

Thunder Bay Of the total US overnight visits to Thunder Bay (0.231 million), 192,000, or 83.2% visited only the Thunder Bay district. The remaining 39,000 visitors to Thunder Bay (or 16.8%) visited 17 Ontario regions and generated in the process 48,000 overnight visits. These numbers imply that the overnight US visitors who visited Thunder Bay and one or more other Ontario regions, visited on average 2.23 Ontario regions (including Thunder Bay).

Algoma received 43.8% (or 21,000) of these "excursions", followed by Toronto (12.8% or 5,000). All other regions received minimal visitation levels.

The overnight excursions received by Algoma accounted for 7.3% of the district's total overnight visitors from the US, while those received by Toronto had a minimal impact on Metro's total US visitors (0.2%).

Conclusions:

- As far as the overnight US visitors to Algoma are concerned, it appears that to the region is a travel region on its own right. Some interaction exists between Algoma and Thunder Bay, but this interaction could very well be due to the fact that a number of US visitors who visited Thunder Bay entered Ontario through Sault Ste. Marie (15,000 of them did so), or a number of US visitors who entered Ontario through Rainy River and visited Thunder Bay (53,000 did so) exited the province through Sault Ste. Marie.

Leeds & Grenville Of the total US overnight visits to Leeds & Grenville (0.233 million), 185,000, or 79.2% visited only the Leeds & Grenville region. The remaining 48,000 visitors to Leeds & Grenville (or 20.8%) visited 19 Ontario regions and generated in the process 82,000 overnight visits. These numbers imply that the overnight US visitors who visited Leeds & Grenville and one or more other Ontario regions, visited on average 2.71 Ontario regions (including Leeds & Grenville).

Frontenac received 19.5% (or 16,000) of these "excursions", followed by Niagara (18.3% or 15,000), Ottawa-Carleton (12.2% or 10,000), Toronto (11.0% or 9,000), Cochrane (11.0% or 9,000) and Kent (7.3% or 6,000). All other regions received minimal visitation levels.

The overnight excursions received by Frontenac accounted for 9.9% of the region's total overnight visitors from the US, those received by Niagara accounted for 1.0% of its overnight US visitors, those received by Ottawa-Carleton accounted for 2.7% of its total overnight visitors from the US, those received by Toronto accounted for 0.4% of its overnight US visitors, those received by Cochrane accounted for 34.6% of its overnight US visitors and those received by Kent accounted for 8.5% of its overnight US visitors.

Conclusions:

- As far as the overnight US visitors to Leeds & Grenville are concerned, it appears that the region might be considered as a travel region with Frontenac.

- Due to its position (it contains a number of important international ports of entry into Canada), L & G lies the important Leeds & Grenville-Ottawa-Carleton corridor.

Perth Of the total US overnight visits to Perth (0.174 million), 127,000, or 72.9% visited only the Perth region. The remaining 47,000 visitors to Perth (or 27.1%) visited 19 Ontario regions and generated in the process 64,000 overnight visits. These numbers imply that the overnight US visitors who visited Perth and one or more other Ontario regions, visited on average 2.36 Ontario regions (including Perth).

Toronto received 21.9% (or 14,000) of these "excursions", followed by Niagara (20.3% or 13,000), Waterloo RM (15.6% or 10,000) and Oxford (7.8% or 5,000). All other regions received minimal visitation levels.

The overnight excursions received by Toronto accounted for 0.6% of the region's total overnight visitors from the US, those received by Niagara accounted for 0.9% of its overnight US visitors, those received by Waterloo accounted for 13.3% of its overnight US visitors and those received by Oxford accounted for 13.5% of its total overnight visitors from the US.

Since 82.1% of the Americans who visited Perth entered Ontario either via Sarnia or Windsor (Sarnia 67.2%, Windsor 14.9%), for these "excursionists", Perth is either a stop for the US visitors going to Toronto and Niagara, or Toronto, Niagara and Waterloo are excursions for US visitors to Perth. Of the US overnight visitors who entered Ontario through Niagara, 18,000 visited Perth and of those who entered Ontario through Toronto, 8,000 visited Perth.

Conclusions:

- Although the Perth could be considered a travel region on its own right, as far as the overnight US visitors are concerned, an argument could be made for Perth to form a travel region with Waterloo.
- A more significant interaction than that observed between Perth and Waterloo exists between Perth, Toronto and Niagara, all three regions enhancing each other's appeal to these visitors. However, Perth does not play as significant a role in the Toronto and Niagara markets as they play for Perth.

Frontenac Of the total US overnight visits to Frontenac (0.162 million), 90,000, or 55.2% visited only the Frontenac region. This low incidence of "Frontenac-only" visitation seems to indicate that perhaps due to its location the region is more of a place to visit during a trip to another destination or that the region is visited by overnight Americans' on touring trips.

The remaining 72,000 visitors to Frontenac (or 44.8%) visited 27 Ontario regions and generated in the process 143,000 overnight visits. These numbers imply that the overnight US visitors who visited Frontenac and one or more other Ontario regions, visited on average 2.99 Ontario regions (including Frontenac).

Niagara received 23.1% (or 33,000) of these "excursions", followed by Toronto (22.4% or 32,000), Ottawa-Carleton (12.6% or 18,000), Leeds & Grenville (11.2% or 16,000) and Cochrane (6.3% or 9,000). All other regions received minimal visitation levels.

The overnight excursions received by Niagara accounted for 2.3% of the region's total overnight visitors from the US, those received by Toronto accounted for 1.5% of its overnight US visitors, those received by Ottawa-Carleton accounted for 4.8% of its overnight US visitors, those received by Leeds & Grenville accounted for 6.9% of its total overnight visitors from the US and those received by Cochrane accounted for 34.6% of its overnight US visitors.

Conclusions:

- As far as the overnight US visitors to Frontenac are concerned, it appears that the region could form a travel region with Leeds & Grenville and Ottawa-Carleton.
- It could also form a virtual travel region with Toronto and Niagara, although the region is not as important to Toronto and Niagara as these two regions are for Frontenac.
- Frontenac appears to be well located on three important corridors: The Quebec border-Toronto-Niagara corridor, the Leeds & Grenville-Toronto-Niagara corridor and the Leeds & Grenville-Ottawa corridor.
- As well, but of a lesser importance, Frontenac is well placed on the Leeds & Grenville-Northern Ontario corridor.
- Due perhaps to its location, Frontenac may play more of a role in the US touring market rather than the US market that takes trips to Ontario with a specific destination in mind.

Middlesex Of the total US overnight visits to Middlesex (0.160 million), 108,000, or 67.3%, visited only the Middlesex region. The remaining 52,000 visitors to Middlesex (or 32.7%) visited 26 Ontario regions and generated in the process 74,000 overnight visits. These numbers imply that the overnight US visitors who visited Middlesex and one or more other Ontario regions, visited on average 2.42 Ontario regions (including Middlesex).

As was the case with Frontenac, but to a lesser extend, Middlesex has a low incidence of "Middlesex-only" visitation, implying that these overnight excursions maybe the result of its location being right between the road from Sarnia and Windsor (both important ports of entry into Ontario for overnight US residents) to Toronto and Niagara.

Toronto received 21.6% (or 16,000) of these "excursions", followed by Niagara (16.2% or 12,000), Essex (8.1% or 6,000), Ottawa-Carleton (6.8% or 5,000), Hamilton-Wentworth (6.8% or 5,000) and Kent (6.8% or 5,000). All other regions received minimal visitation levels.

The overnight excursions received by Toronto accounted for 0.7% of the region's total overnight visitors from the US, those received by Niagara accounted for 0.8% of its overnight US visitors, those received by Essex accounted for 1.3% of its overnight US visitors, those received by Ottawa-Carleton accounted for 1.3% of its overnight US visitors, those received by Hamilton-Wentworth accounted for 4.1% of its total overnight visitors from the US and those received by Kent accounted for 7.0% of its overnight US visitors.

Conclusions:

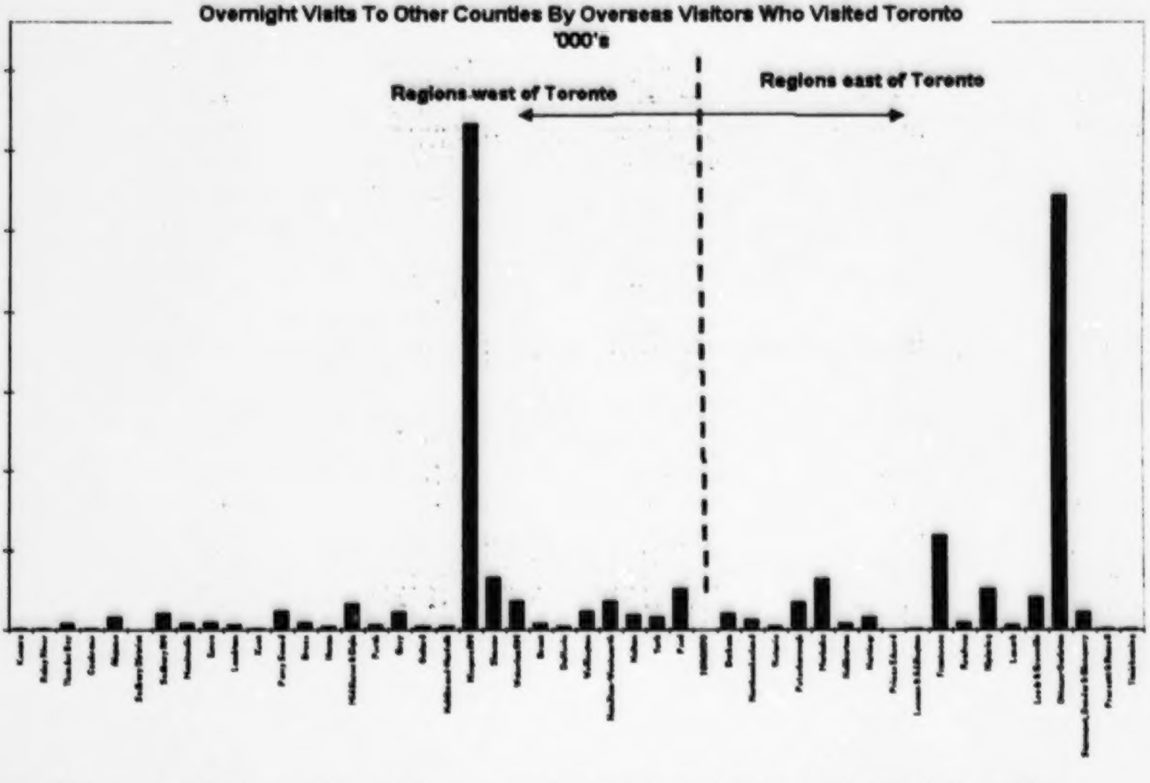
- As far as the overnight US visitors to Middlesex are concerned, it appears that the region could form a travel region with Kent.
- It could also form a virtual travel region with Toronto and Niagara, although the region is not as important to Toronto and Niagara as these two regions are for Middlesex.
- Middlesex appears to be well located on two important corridors: The Windsor-Toronto-Niagara corridor and the Sarnia-Toronto-Niagara corridor.

- Due perhaps to its location, Middlesex may play more of a role in the US touring market rather than the US market that takes trips to Ontario with a specific main destination in mind.

C.7. The Overnight Overseas Market

Of the total overnight visitors to Ontario from overseas countries (2.188 million), 2.180 million, or 99.6%, had declared in 1996 the regions visited within Ontario. Three Ontario regions accounted for 79.9% of those with a known region visited. These regions were: Toronto, Niagara and Ottawa-Carleton.

Toronto Of the total overnight overseas visits to Metro Toronto (1.397 million), 0.786 million, or 56.3% visited only Toronto. The remaining 611,000 visitors to Toronto (or 43.7%) visited 46 Ontario counties (Sudbury District and Prince Edward County were the only regions not visited) and generated in the process 1,014,000 overnight visits to other Ontario regions. These numbers imply that the overnight overseas visitors who visited Toronto and one or more other Ontario regions, visited on average 2.66 Ontario regions (including Toronto).



Niagara RM received the largest share of these overnight excursions (31.3%, or 317,000), followed by Ottawa-Carleton (26.8%, or 272,000), Frontenac (5.8%, or 59,000), Simcoe (3.3%, or 33,000), Muskoka (3.2%, or 32,000), Peel (2.6% or 26,000) and Nipissing (2.4%, or 24,000, of which 19,000 had an overnight visit in Algonquin Park).

These overnight excursions from Toronto played a significant role in other regions' overseas market; they accounted for 51.5% of the Niagara region's overnight overseas visitors, for 57.5% of the overnight overseas visitors to Ottawa-Carleton, for 63.4% of the overnight overseas visitors to Frontenac, for 61.1% of the overnight overseas visitors to Simcoe, for 71.1% of the overnight overseas visitors to Muskoka, for 31.0% of the overnight overseas visitors to Peel and for 63.2% of the overnight overseas visitors to Nipissing. In fact, for most of the Ontario regions a large share of their overnight overseas visitors had also visited Metro Toronto.

This is not surprising given the fact that 62.6% of the overnight overseas visitors to Ontario entered the province through Toronto, followed by Prescott/Stormont (14.4%) and Niagara RM (10.7%).

Conclusions:

- As far as the overnight overseas visitors are concerned, Toronto is an important feeder market for all Ontario regions.
- For these visitors, Toronto forms at least a one-way travel region with almost every county or district in Ontario and a two-way virtual travel region with Niagara and Ottawa.
- The main region of interest to those overnight overseas visitors who visited Toronto seems to include the area bounded by Niagara-Simcoe-Muskoka-Algonquin Park-Ottawa-Frontenac-Toronto.
- Toronto is also an important destination region for these visitors as a majority of them (56.3%) visited only Metro.

Niagara Of the total overnight overseas visits to Niagara RM (0.616 million), 0.228 million, or 37.0% visited only Niagara. The remaining 388,000 visitors to Niagara (or 63.0%) visited 39 Ontario counties and generated in the process 718,000 overnight visits to other Ontario regions. These numbers imply that the overnight overseas visitors who visited Niagara and one or more other Ontario regions, visited on average 2.85 Ontario regions (including Niagara).

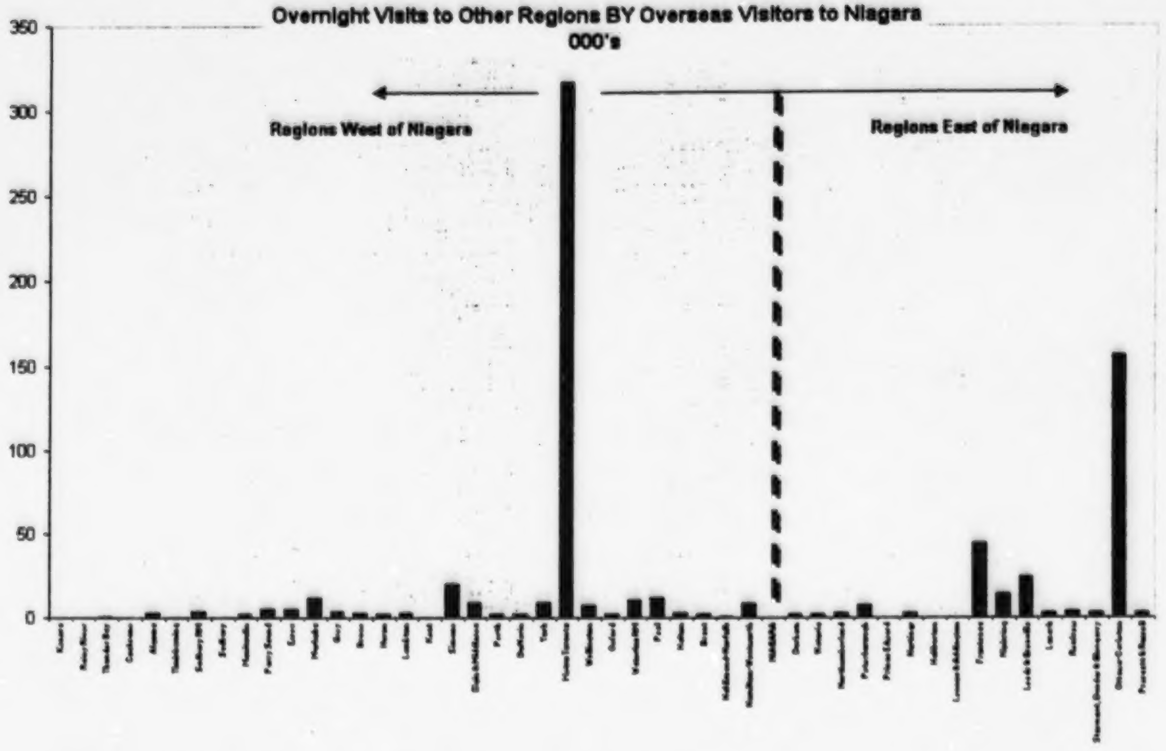
Toronto received the largest share of these overnight excursions (44.2%, or 317,000), followed by Ottawa-Carleton (21.7%, or 156,000), Frontenac (6.1%, or 44,000), Leeds & Grenville (3.3% or 24,000), Simcoe (2.8%, or 20,000), Nipissing (1.8%, or 13,000, of which 10,000 had an overnight visit in Algonquin Park), Muskoka (1.7%, or 12,000) and Peel (1.7% or 12,000).

Since the list of regions that received the overnight "excursions" of the overseas visitors to Niagara is exactly the same as that of Toronto's (with the exception of Leeds & Grenville), it seems that these visits were taken by the same visitors who had also visited Toronto.

Conclusions:

- Although Niagara is not as important a destination as Toronto is for the overnight overseas visitors to Ontario, it does enhance Toronto's, and Ontario's, appeal to these visitors.
- It would appear that the circular corridor formed by Muskoka-Algonquin Park-Ottawa-Leeds & Grenville-Frontenac-Toronto-Niagara-Simcoe, forms a travel region for the overnight overseas visitors.

Ottawa-Carleton Of the total overnight overseas visits to Ottawa (0.473 million), 0.131 million, or 27.6% visited only Ottawa-Carleton. The remaining 342,000 visitors to Ottawa (or 72.4%) visited 36 Ontario counties and generated in the process 660,000 overnight visits to other Ontario regions. These numbers imply that the overnight overseas visitors who visited Ottawa-Carleton and one or more other Ontario regions, visited on average 2.93 Ontario regions (including Ottawa).



Toronto received the largest share of these overnight excursions (41.2%, or 272,000), followed by Niagara (23.6%, or 156,000), Frontenac (8.5%, or 56,000), Leeds & Grenville (3.2% or 21,000), Nipissing (2.7%, or 18,000, of which 15,000 had an overnight visit in Algonquin Park), Muskoka (2.3%, or 15,000) and Simcoe (2.1%, or 14,000).

As was the case with Niagara, the list of other regions visited by the overseas visitors who visited Ottawa-Carleton not only matches that of Toronto in names, but also in ranking and levels of visitation, indicating again that these visits were taken by the same overseas visitors who had also visited Toronto and Niagara and these other regions.

Conclusions:

- Although Ottawa-Carleton is not as important a destination as Toronto is for the overnight overseas visitors to Ontario, it does enhance Toronto's, and Ontario's, appeal to these visitors.
- It would appear that the circular corridor formed by Muskoka-Nipissing-Ottawa/Carleton-Leeds & Grenville-Frontenac-Toronto-Niagara-Simcoe, constitutes a travel region for the overnight overseas visitors.

D. Overnight Pleasure Travel Regions

D.1. The Ontario Residents' Overnight Pleasure Market

In 1996, there were 17 Ontario counties/districts that received, as destinations, over 200,000 overnight pleasure visitors from Ontario. These counties/districts accounted for 73.1% of the overnight pleasure trips with known destinations generated by the Ontario residents in the province. These 17 regions with the addition of Algoma and Thunder Bay cover a large part of Ontario and accounted in 1996 for 76.2% of Ontarians' overnight pleasure trips in Ontario with known destination.

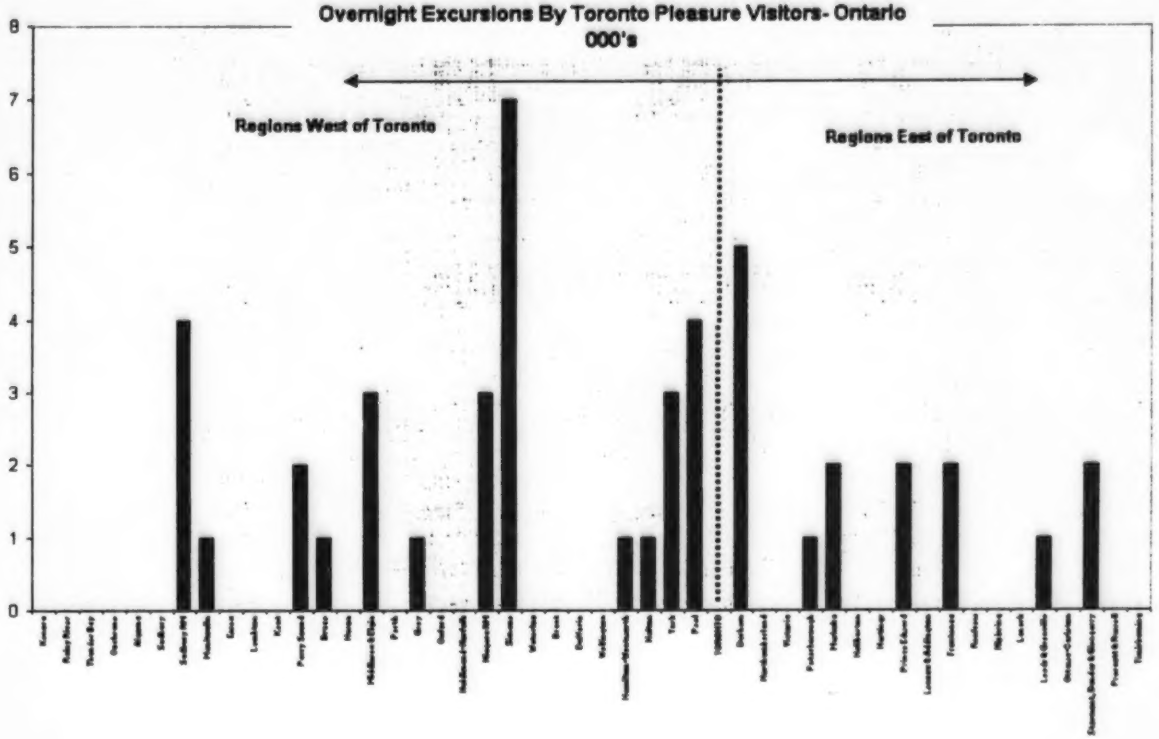
Ontario Residents On Overnight Pleasure Trips In Ontario, 1996

Name Of County/District	Number Of Overnight Visits With A Destination In...	Number Of Visitors Who Took Overnight Excursions To Other Ontario Regions	Overnight Excursions As A % Of Total Overnight Destination Visits
Simcoe	1,335,000	14,000	1.0%
Muskoka	1,045,000	7,000	0.7%
Toronto	687,000	21,000	3.1%
Peterborough	581,000	2,000	0.3%
Bruce	546,000	13,000	2.4%
Niagara	532,000	31,000	5.8%
Haliburton	479,000	2,000	0.4%
Parry Sound	455,000	10,000	2.2%
Frontenac	371,000	6,000	1.6%
Ottawa-Carleton	340,000	34,000	10.0%
Renfrew	340,000	1,000	0.3%
Hastings	338,000	8,000	2.4%
Lambton	241,000	4,000	1.7%
Nipissing	239,000	20,000	8.4%
Victoria	216,000	0	0.0%
Haldimand-Norfolk	210,000	2,000	1.0%
York	205,000	0	0.0%
Algoma	189,000	6,000	3.2%
Thunder Bay	157,000	8,000	5.1%

These 19 regions could form the basis around which the travel regions relevant for Ontario pleasure travellers would be built. They are: Simcoe, Muskoka, Metro Toronto, Peterborough, Bruce, Niagara, Haliburton, Parry Sound, Frontenac, Ottawa-Carleton, Renfrew, Hastings, Lambton, Nipissing, Victoria, Haldimand-Norfolk, York, Algoma and Thunder Bay.

However, as the table above demonstrates, overnight excursions by Ontario residents on an overnight pleasure trip are not common. From the regions mentioned above, only Toronto, Niagara, Ottawa-Carleton, and Nipissing deserve further investigation, as the other regions do not generate enough overnight excursions and as such they are travel regions on their own right.

Toronto Of the overnight pleasure visitors from Ontario with Metro Toronto as the destination of their trip (0.687 million), 21,000 took overnight excursions to 16 Ontario counties in 1996.



These excursions varied from Sudbury, to Stormont & Dundas, to Niagara, and they represented 3.1% of Metro's total overnight pleasure trips taken by Ontarians with a destination in Metro. These 21,000 visitors took a total of 33,000 overnight excursions to other Ontario regions. In other words, each of these 21,000 visitors visited, on an overnight basis, 2.57 Ontario regions including Toronto.

Simcoe received 21.2% (or 7,000) of these excursions, followed by Sudbury RM (12.1% or 4,000). All other 14 regions received minimal visitation levels. These overnight excursions played a minor role in both of these regions' overnight pleasure market from Ontario. They represented 0.5% of Simcoe's total overnight pleasure visits from Ontario and 3.1% of Sudbury's.

Conclusions:

- As far as the overnight pleasure visitors from Ontario are concerned, Toronto is a travel region on its own right. However, some minimal interaction occurs between Toronto and Simcoe.

Niagara Of the overnight pleasure visitors from Ontario with Niagara as the destination of their trip (0.532 million), 31,000 took overnight excursions to 12 Ontario counties in 1996.

These excursions varied from Sudbury, to Prince Edward County, to Middlesex, and they represented 5.8% of Niagara's total overnight pleasure trips taken by Ontarians with a destination in Niagara. These 31,000 visitors took a total of 52,000 overnight excursions to other Ontario regions, visiting on average 2.68 Ontario regions, including Niagara.

Toronto received 34.6% (or 18,000) of these excursions, followed by Hamilton-Wentworth (17.3% or 7,000) and Nipissing (13.5% or 7,000, all of which occurred in Algonquin Park). All other 9 regions received minimal visitation levels.

These overnight excursions represented 2.3% of Toronto's total overnight pleasure visits from Ontario, 6.4% of Hamilton-Wentworth's and 3.5% of Nipissing's.

Conclusions:

- As far as the overnight pleasure visitors from Ontario are concerned, Niagara is by and large a travel region on its own right. However, a weak argument could be made in favour of a travel region that includes Niagara, Hamilton and Toronto.

Ottawa-Carleton Of the overnight pleasure visitors from Ontario with Ottawa-Carleton as the destination of their trip (0.340 million), 34,000 took overnight excursions to 8 Ontario counties.

These excursions were mainly concentrated in the northeastern part of Ontario and they represented 10.0% of Ottawa-Carleton's total overnight pleasure trips taken by Ontarians with a destination in that region. These 34,000 visitors took a total of 43,000 overnight excursions to other Ontario regions. In other words, each of these 34,000 visitors visited, on average, 2.26 Ontario regions, including Ottawa-Carleton.

Frontenac received 37.2% (or 16,000) of these excursions, followed by Peterborough (16.3% or 7,000), Hastings (11.6% or 5,000) and Nipissing (11.6% or 5,000, all of which occurred in Algonquin Park). All other 4 regions received minimal visitation levels.

These overnight excursions represented 3.8% of Frontenac's total overnight pleasure visits from Ontario, 1.2% of Peterborough's, 1.4% of Hasting's and 2.5% of Nipissing's.

Conclusions:

- As far as the overnight pleasure visitors from Ontario are concerned, Ottawa-Carleton is by and large a travel region on its own right. However, some interaction exists between Ottawa-Carleton, Frontenac, Peterborough, Hastings and Algonquin Park.

Nipissing Of the overnight pleasure visitors from Ontario with Nipissing as the destination of their trip (0.239 million), 20,000 took overnight excursions to 4 Ontario counties in 1996.

These excursionists represented 8.4% of Nipissing's total overnight pleasure trips taken by Ontarians with a destination in that region. These 20,000 visitors took a total of 20,000 overnight excursions to other Ontario regions. In other words, each of these 20,000 visitors visited, on on average 2.00 Ontario regions, including Nipissing.

Haliburton received 55.0% (or 11,000) of these excursions, followed by Muskoka (30.0% or 6,000). The other two regions received minimal visitation levels.

These overnight excursions represented 2.2% of Haliburton's total overnight pleasure visits from Ontario and 0.6% of Muskoka's.

Conclusions:

- As far as the overnight pleasure visitors from Ontario are concerned, Nipissing is by and large a travel region on its own right. However, some interaction exists between Nipissing and Haliburton.

D.2. The Quebec Residents' Overnight Pleasure Market

In 1996, there were 5 Ontario regions that received, as destinations, over 20,000 overnight pleasure visitors from Quebec. These regions accounted for 75.4% of the overnight pleasure trips with known destinations generated by the Quebec residents in Ontario. The table below shows these regions, the total visits from Quebec that were destined to these regions and the number of excursionists:

Quebec Residents On Overnight Pleasure Trips In Ontario, 1996

Name Of County/District	Number Of Overnight Visits With A Destination In...	Number Of Visitors Who Took Overnight Excursions To Other Ontario Regions	Overnight Excursions As A % Of Total Overnight Destination Visits
Ottawa-Carleton	116,000	0	0.0%
Toronto	101,000	7,000	6.9%
Niagara	30,000	3,000	10.0%
Stormont, Dundas & Glengarry	24,000	0	0.0%
Renfrew	23,000	0	0.0%

As the tables indicates, there are only two regions that need further investigation: Toronto and Niagara.

Toronto Of the total overnight pleasure visitors from Quebec (0.101 million) who took a trip with a destination in Toronto, 7,000 took overnight excursions to Ottawa-Carleton.

These excursions accounted for 6.5% of Toronto's total overnight pleasure visits from Quebec and for 5.6% of Ottawa-Carleton's.

Conclusion:

- Toronto and Ottawa-Carleton form a weak virtual travel region as far as the overnight pleasure visitors from Quebec are concerned. However, this an one-way relationship in the sense that although Ottawa-Carleton enhances the appeal of Toronto to the Quebec residents who take a trip with a destination in Toronto, the opposite is not true.

Niagara Of the total overnight pleasure visitors from Quebec (0.03 million) who took a trip with a destination in Toronto, 3,000 took overnight excursions to 2 Ontario regions.

Toronto received 2,000 of these excursions and Stormont, Dundas & Glengarry received 1,0000.

These visits accounted for 1.9% of Toronto's total overnight pleasure visits from Quebec and for 4.2% of Stormont, Dundas & Glengarry's.

Conclusion:

- Niagara is a travel region in its own right as far as the overnight pleasure visitors from Quebec are concerned. However, there is a weak one-way relationship with Toronto.

D.3. The Manitoba Residents' Overnight Pleasure Market

In 1996, Kenora received, as a destination, 79.3% of the overnight pleasure visitors from Manitoba (or 149,000 out of the 188,000 overnight pleasure visitors from Manitoba with an Ontario destination and a known region of visit), followed by Toronto (19,000 or 10.1%). As such we will only investigate further the interaction between Kenora and other Ontario regions.

Kenora There was no other Ontario region visited by the 149,000 overnight pleasure visitors from Manitoba who visited Kenora.

Conclusion:

- Kenora is a travel region in its own right as far as the overnight pleasure visitors from Manitoba are concerned.

D.4. The Atlantic Residents' Overnight Pleasure Market

Of the 59,000 overnight pleasure visitors to Ontario from Atlantic provinces with an Ontario destination and a known region of visit, 33,000 (or 55.9%) visited Toronto, while all of the remaining 11 regions visited by the residents of the Atlantic provinces received minimal visitation levels. As such, we will only investigate further the Toronto market.

Toronto Of the 33,000 who visited Toronto, 5,000 (or 15.2%) visited 2 additional Ontario regions. Ottawa-Carleton received 3,000 of these visits and Niagara received 2,000. Although these excursions are small in terms of numbers, they did accounted for 25% of Ottawa-Carleton's total overnight pleasure visits from the Atlantic provinces and for 22% of Niagara's.

It is interesting to note, that of the 9,000 overnight pleasure visitors from the Atlantic provinces who visited Ottawa-Carleton as a destination, 2,000 (or 22.2%) visited Toronto on an overnight excursion, while of the 4,000 who visited Niagara as a destination, none visited Toronto.

Conclusion:

- Toronto, Ottawa-Carleton and Niagara can be considered as a virtual travel region as far as the overnight pleasure visitors from the Atlantic provinces are concerned.

D.5. The Western Canada Overnight Pleasure Market

In 1996, two Ontario regions accounted for 70.2% of the 57,000 overnight pleasure visitors from western Canada who visited Ontario as a destination. These regions were Toronto and Ottawa-Carleton. As the table below demonstrates, only Toronto needs to be further investigated.

Western Canada's Residents On Overnight Pleasure Trips In Ontario, 1996

Name Of County/District	Number Of Overnight Visits With A Destination In...	Number Of Visitors Who Took Overnight Excursions To Other Ontario Regions	Overnight Excursions As A % Of Total Overnight Destination Visits
Toronto	26,000	10,000	38.5%
Ottawa-Carleton	14,000	0	0.0%

Toronto Of the 26,000 residents of western Canada who visited Toronto for an overnight pleasure trip, 10,000 (or 38.5%) visited 5 additional Ontario regions (4 known and one unknown) and generated in the process 13,000 overnight visits.

Ottawa-Carleton received 2,000 of these visits and Niagara received 3,000. Although these excursions are small in terms of numbers, they did accounted for 7.4% of Ottawa-Carleton's total overnight pleasure visits from western Canada and for 33.3% of Niagara's.

Conclusion:

- Toronto, Ottawa-Carleton and Niagara can be considered as a virtual travel region as far as the overnight pleasure visitors from western Canada are concerned. However, this relationship is one-way in the sense that although Niagara and Ottawa-Carleton appear to enhance Toronto's appeal to these visitors the opposite is not true. That is, of the overnight pleasure visitors from western Canada who took a trip with a destination in Ottawa-Carleton or Niagara, none visited Toronto.

D.6. The US Overnight Pleasure Market

Of the total overnight pleasure visitors to Ontario from the US (3.893 million), 3.890 million, or 99.9%, had declared in 1996 the regions visited within Ontario. Seventeen Ontario counties/districts accounted for 74.7% of those with a known region visited, as opposed to 11 regions accounting for 88.1% in the total overnight US market. These countries/districts were: Niagara, Toronto, Algoma, Ottawa-Carleton, Essex, Leeds & Grenville, Thunder Bay, Kenora, Perth, Frontenac, Rainy River, Lambton, Middlesex, Peterborough, Bruce, Hastings and Nipissing.

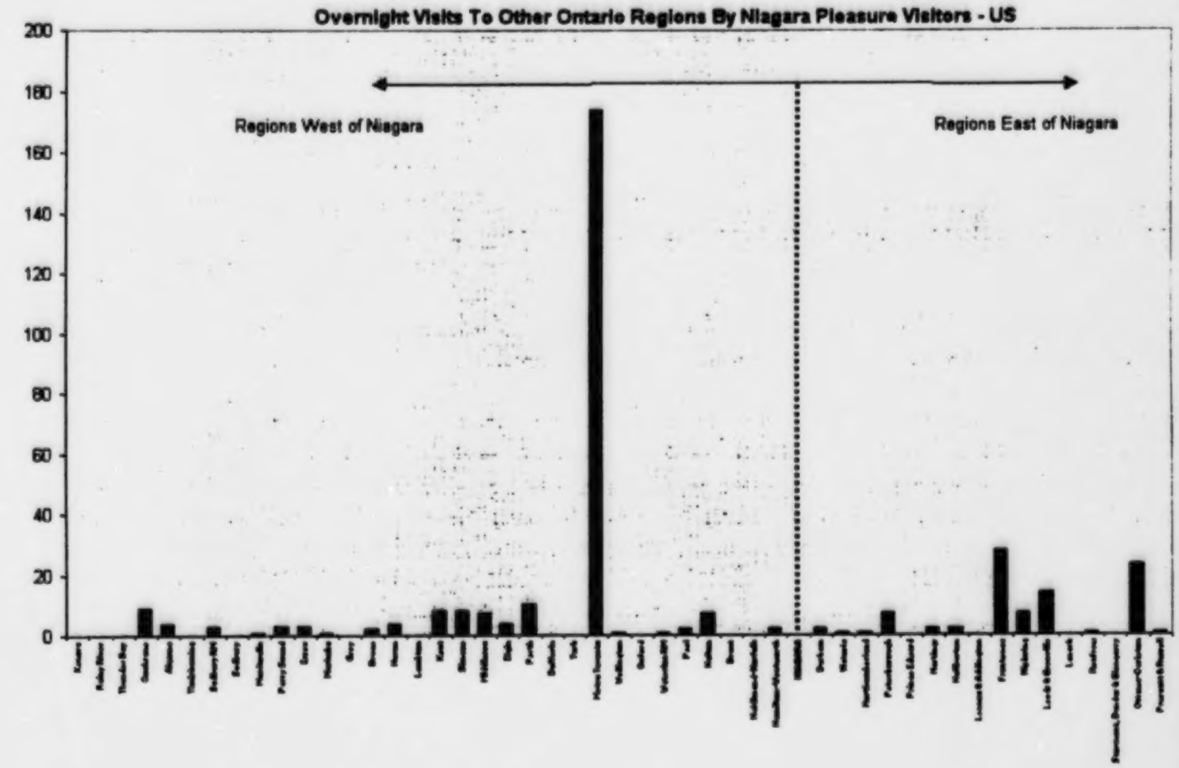
In what follows below, we will only examine further the top 10 of these 17 regions, since the remaining 7 regions do not generate enough travellers' volumes (less than 100,000) and as such, they cannot play an important role in other Ontario regions' overnight pleasure visitors from the US.

Niagara Of the total US overnight pleasure visits to Niagara RM (1.149 million), 0.899 million, or 78.2% visited only the Niagara region. The remaining 250,000 visitors to Niagara (or 21.8%) visited 32 Ontario regions and generated in the process 343,000 overnight visits to other Ontario regions. These numbers imply that the overnight pleasure US visitors who visited Niagara and one or more other Ontario regions, visited on average 2.37 Ontario regions (including Niagara).

Toronto received 50.7% (or 174,000) of these overnight excursions, followed by Frontenac (8.2%, 28,000), Ottawa-Carleton (6.7% or 23,000), Leeds & Grenville (4.1% or 14,000) and Perth (2.9% or 10,000).

These excursions accounted for 16.2% of Toronto's total overnight US visitors, for 25.5% of Frontenac's, for 11.1% of Ottawa', for 7.8% of Leeds & Grenville's and for 6.6% of Perth's.

The visits to Frontenac and Leeds & Grenville could have been made either on the way to Ottawa or on the way home after visiting Toronto. That is, a US visitor enters Ontario through a Niagara port, then continues to Toronto, then to Frontenac (Kingston)/Ottawa and then to Leeds & Grenville where he/she exits Canada to return home.



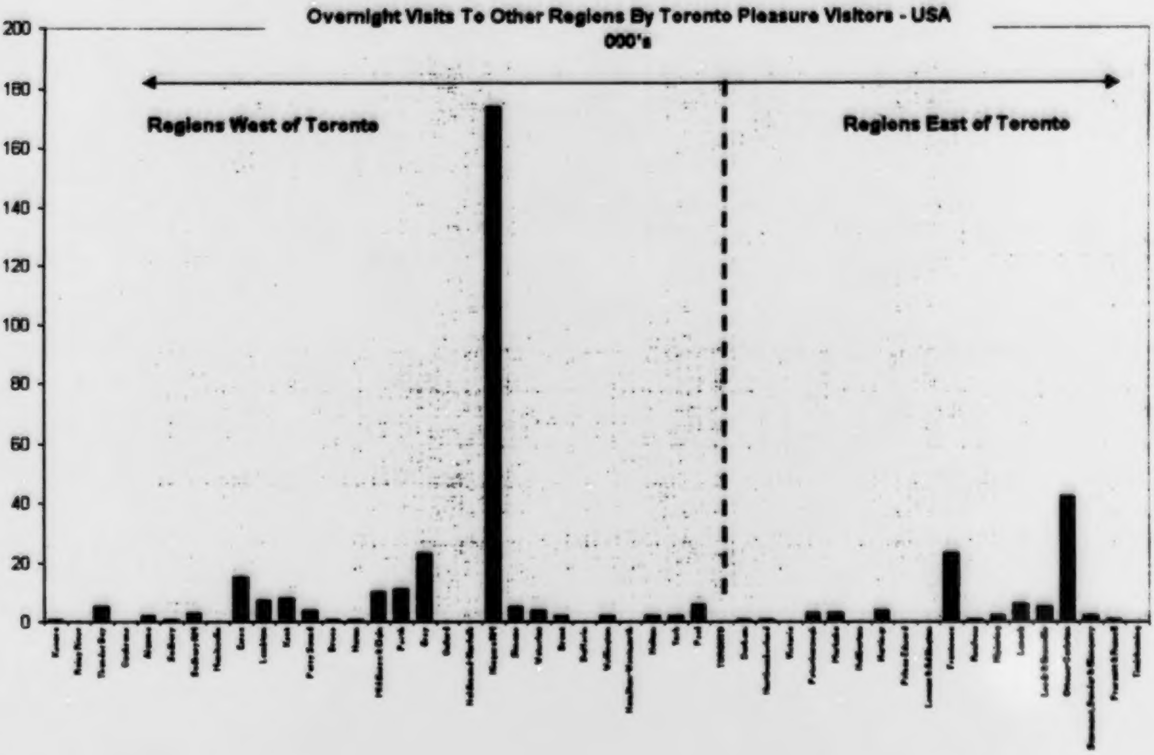
Conclusions:

- As far as the overnight pleasure visitors from the US to Niagara are concerned, it appears that Toronto is the main region that significantly enhances Niagara's appeal to these visitors. However, the opposite is not true. That is, only a small number of US overnight visitors who entered Canada through Toronto visited Niagara (8.6% or 18,000).

- The Niagara-Toronto-Frontenac-Leeds & Grenville-Ottawa/Carleton corridor appears to be an important touring corridor due, in part, to the Leeds & Grenville exit/entry points (Gananoque, Brockville, Prescott).

Toronto Of the total US overnight pleasure visits to Metro Toronto (1.076 million), 0.775 million, or 72.0% visited only Toronto. The remaining 301,000 visitors to Toronto (or 28.0%) visited 35 Ontario counties and generated in the process 383,000 overnight visits to other Ontario regions. These numbers imply that the overnight US visitors who visited Toronto and one or more other Ontario regions, visited on average 2.27 Ontario regions (including Toronto).

Niagara RM received 45.4% of these overnight excursions (or 174,000), followed by Ottawa-Carleton (11.0%, or 42,000), Frontenac (6.0% or 23,000), Grey (6.0% or 23,000), Essex (3.9% or 15,000), Perth (2.9% or 11,000) and Middlesex (2.6% or 10,000).



These excursions accounted for 15.1% of Niagara's overnight pleasure visitors from the US, for 20.2% of Ottawa's, for 20.9% of Frontenac's, for 65.7% of Grey's, for 7.2 of Essex's, for 7.2% of Perth's and for 17.5% of Middlesex's.

The overnight visits to Niagara, Essex, Middlesex, Frontenac and Perth were most likely made by Americans on the way to Toronto/home rather than as "genuine" excursions after having arrived in Toronto. For example, of the 1,790,000 overnight pleasure visitors from the US who entered the province through a Niagara RM port of entry, 525,000 (or 29.3%) visited Metro Toronto for an overnight stay. However, the opposite was not true. Of the 209,000 of overnight pleasure visitors from the US who entered Ontario through the Toronto ports, only 18,000 (or 8.6%) visited Niagara RM for an overnight stay.

Similarly, only 0.5% of the overnight US pleasure visitors who entered Ontario through Toronto took an overnight trip to Essex (Windsor), 0.5% took an overnight trip to Middlesex (London), 1.9% took an overnight trip to Frontenac (none visited Leeds & Grenville) and 2.9% visited Perth. On the other hand, 31.8% of the overnight pleasure visitors from the US who entered the province through Windsor also visited Toronto for an overnight stay, 4.8% of those who entered the province through one of the ports of entry in the Leeds & Grenville county (the eastern neighbour of Frontenac) also visited Metro for an overnight stay and 23.4% of those who entered Ontario through Sarnia visited Toronto (Perth being only 30 kms away from the Woodstock exit of the portion of the 401 Hwy that is connecting Sarnia to Toronto).

Some of the more "genuine" overnight excursions, although small in numbers, were those made by the US visitors to Grey and Ottawa-Carleton. For example, 6.3% (or 1,000 visitors) of the overnight pleasure visitors from the US who cleared customs at the Ottawa airport also visited Toronto for an overnight stay, while 4.3% (or 9,000) of the overnight pleasure visitors from the US who cleared customs at the Toronto airport also took an overnight excursion to Ottawa-Carleton. Grey is neither a port of entry, nor on the way to a major port of entry to Canada.

Conclusions:

- As far as the overnight pleasure visitors from the US to Toronto are concerned, it appears that Niagara is the main region that significantly interacts with Toronto, followed by Ottawa-Carleton. However, the interaction with Niagara is one-way in the sense that it is the US visitors who enter through the Niagara that visit Toronto and not the other way around.

- With the exception of Ottawa and Grey, many of the overnight excursions of the US overnight pleasure visitors to Toronto appear to be on the way to Toronto/home. As such, the corridors Niagara-Toronto, Windsor-Toronto, Sarnia-Toronto and to a lesser extent Toronto-Leeds & Grenville-Ottawa, are important in terms of enhancing and diversifying a US visitor's trip experience to Toronto.

Algoma Of the total US overnight pleasure visits to Algoma (0.252 million), 183,000, or 72.6% visited only the Algoma region. The remaining 69,000 visitors to Algoma (or 27.4%) visited 21 other Ontario regions and generated in the process 89,000 overnight visits. These numbers imply that the overnight US pleasure visitors who visited Algoma and one or more other Ontario regions, visited on average 2.29 Ontario regions (including Algoma).

Victoria received 23.6% (or 21,000) of these overnight "excursions", followed by Thunder Bay (22.5% or 20,000) and Ottawa-Carleton (10.1% or 9,000). Other regions received minimal visitation levels.

The overnight excursions received by Thunder Bay accounted for 12.1% of the district's total overnight US pleasure visitors, those received by Victoria accounted for 77.8% of the county's total overnight pleasure visitors from the US and those received by Ottawa-Carleton accounted for 4.3% of the region's total US overnight pleasure visitors.

These overnight excursions to Victoria were most likely incurred by US visitors entering Ontario through the Leeds & Grenville ports (there were 23,000 US pleasure visitors who entered Leeds & Grenville and visited Victoria and Algoma) and travelling to their destination in Algoma.

Conclusions:

- As far as the overnight US visitors to Algoma are concerned, it appears that to a large extent the region is a travel region on its own right.
- Some interaction exists between Algoma and Thunder Bay, while some other regions, in particularly Victoria, seem to act as resting places for these travellers while they are attempting to reach their destination/home.

Ottawa-Carleton Of the total US overnight pleasure visits to Ottawa-Carleton (0.208 million), 124,000, or 59.6% visited only Ottawa-Carleton. The remaining 84,000 visitors to Ottawa-Carleton (or 40.4%) visited 20 Ontario regions and generated in the process 132,000 overnight visits. These numbers imply that the overnight US pleasure visitors who visited Ottawa-Carleton and one or more other Ontario regions, visited on average 2.57 Ontario regions (including Ottawa-Carleton).

Toronto received 31.8% (or 42,000) of these overnight excursions, followed by Niagara (17.4% or 23,000), Frontenac (12.1% or 16,000), Leeds & Grenville (7.6% or 10,000), Nipissing (6.8% or 9,000, of which 5,000 visited Algonquin Park) and Algoma (6.8% or 9,000).

These overnight excursions accounted for 3.9% of Toronto's total overnight US pleasure visitors, for 2.0% of Niagara's, for 14.5% of Frontenac's, for 5.6% of Leeds & Grenville's, for 3.4% of Algoma's and for 21.4% of Nipissing's.

Although it appears that there is some interaction between Ottawa and Toronto, enhancing each other's appeal, this interaction is only one way. That is, of the US pleasure visitors who entered Canada through Ottawa, only 1,000 visited Toronto, but of those who entered Canada through Toronto, 9,000 visited Ottawa-Carleton for an overnight stay (the remaining 32,000 US visitors who visited both Toronto and Ottawa-Carleton entered Canada through other Ontario ports, with Leeds & Grenville and Niagara Falls being the most important ones).

Conclusions:

- As far as the overnight US pleasure visitors to Ottawa-Carleton are concerned, it appears that the region enhances Toronto's appeal to those visitors, however the opposite is not true. That is, only a small number of US overnight pleasure visitors who entered Canada through Ottawa-Carleton visited Toronto.
- The Ontario regions that benefit the most by the Americans who visited Ottawa-Carleton are those that contain international ports into Canada, such as Toronto, Leeds & Grenville, Frontenac, Leeds & Grenville, Algoma and Niagara.
- Although Toronto, Ottawa and Niagara appear to form a virtual travel region for the overnight US pleasure visitors to Ontario, the impact that the Ottawa-Carleton visitors make to the other two regions is insignificant.
- The Niagara-Toronto-Frontenac-Leeds & Grenville-Ottawa corridor appears to be a significant corridor for these visitors.

Essex Of the total US overnight pleasure visits to Essex (0.208 million), 186,000, or 89.0% visited only Essex. The remaining 22,000 pleasure visitors to Essex (or 11.0%) visited 7 Ontario regions and generated in the process 32,000 overnight visits. These numbers imply that the overnight US pleasure visitors who visited Essex and one or more other Ontario regions, visited on average 2.45 Ontario regions (including Essex).

Toronto received 46.9% (or 15,000) of these overnight visits, followed by Middlesex (18.8%, or 6,000). All other 5 regions received minimal visitation levels.

These overnight excursions accounted for 1.4% of Toronto's total overnight US pleasure visitors, and for 10.5% of Middlesex's.

Since Middlesex is on the Windsor-Toronto corridor, these overnight excursions could have been made by those who entered Windsor, visited the county and then moved on to visit Toronto.

Conclusions:

- As far as the overnight US visitors to Essex are concerned, it appears that the region is a travel region on its own right. Some minimal interaction exists between Essex and Toronto.
- Since Essex is on the important Windsor-Toronto corridor, there appears to be an opportunity to retain more the overnight US pleasure visitors who enter Ontario through Windsor that is presently the case. Of the 647,000 overnight US pleasure visitors who entered Ontario through Windsor, 206,000 visited Toronto and only 119,000 visited Essex.

Leeds & Grenville Of the total US overnight pleasure visits to Leeds & Grenville (0.179 million), 140,000, or 78.2% visited only the Leeds & Grenville region. The remaining 39,000 visitors to Leeds & Grenville (or 21.8%) visited 12 Ontario regions and generated in the process 64,000 overnight visits. These numbers imply that the overnight US pleasure visitors who visited Leeds & Grenville and some other Ontario region, visited on average 2.64 Ontario regions (including L & G).

Frontenac received 21.9% (or 14,000) of these "excursions", followed by Niagara (21.9% or 14,000), Ottawa-Carleton (15.6% or 10,000) and Cochrane (14.0% or 9,000). All other regions received minimal visitation levels.

The overnight excursions received by Frontenac accounted for 12.7% of the region's total overnight pleasure visitors from the US, those received by Niagara accounted for 1.2% of its overnight US pleasure visitors, those received by Ottawa-Carleton accounted for 4.8% of its total overnight pleasure visitors from the US and those received by Cochrane accounted for 50.0% of its overnight pleasure visitors from the US.

Conclusions:

- As far as the overnight US pleasure visitors to Leeds & Grenville are concerned, it appears that the region is by and large a travel region on its own right.
- A case could be made that for Leeds & Grenville and Frontenac to form a travel region, while Niagara and Ottawa-Carleton seem to enhance Leeds & Grenville's appeal to this market.

Thunder Bay Of the total US overnight pleasure visits to Thunder Bay (0.165 million), 132,000, or 80.2% visited only the Thunder Bay district. The remaining 33,000 visitors to Thunder Bay (or 19.8%) visited 11

Ontario regions and generated in the process 40,000 overnight visits. These numbers imply that the overnight US pleasure visitors who visited Thunder Bay and one or more other Ontario regions, visited on average 2.21 Ontario regions (including Thunder Bay).

Algoma received 50.0% (or 20,000) of these "excursions", followed by Toronto (12.5% or 5,000). All other regions received minimal visitation levels.

The overnight excursions received by Algoma accounted for 7.9% of the district's total overnight pleasure visitors from the US, while those received by Toronto had a minimal impact on Metro's total US overnight pleasure visitors (0.5%).

Conclusions:

- As far as the overnight US visitors to Thunder Bay are concerned, it appears that to the region is a travel region on its own right. Some interaction exists between Algoma and Thunder Bay, but this interaction could very well be due to the fact that a number of US visitors who visited Thunder Bay entered Ontario through Sault Ste. Marie (15,000 of them did so), or a number of US visitors who entered Ontario through Rainy River and visited Thunder Bay (51,000 did so), exited the province through Sault Ste. Marie.

Kenora Of the total US overnight pleasure visits to Kenora (0.157 million), 142,000, or 90.5% visited only the Kenora district. The remaining 15,000 visitors to Kenora (or 9.5%) visited 9 Ontario regions and generated in the process 17,000 overnight visits. These numbers imply that the overnight US pleasure visitors who visited Kenora and one or more other Ontario regions, visited on average 2.13 Ontario regions (including Kenora).

Rainy River received 29.4% (or 5,000) of these "excursions". Other regions received minimal visitation levels.

The overnight excursions received by Rainy River accounted for 9.4% of the district's total overnight visitors from the US, and they accounted for 3.2% of Kenora's.

Conclusions:

- As far as the overnight US pleasure visitors to Kenora are concerned, the region is a travel region on its own right. Some minimal interaction exists between Kenora and Rainy River, due primarily to the fact that the international ports of entry into Ontario are located in Rainy River.

Perth Of the total US overnight pleasure visits to Perth (0.152 million), 118,000, or 77.3% visited only the Perth region. The remaining 34,000 visitors to Perth (or 22.7%) visited 13 Ontario regions and generated in the process 42,000 overnight visits. These numbers imply that the overnight US pleasure visitors who visited Perth and one or more other Ontario regions, visited on average 2.24 Ontario regions (including Perth).

Toronto received 26.2% (or 11,000) of these "excursions", followed by Niagara (23.8% or 10,000) and Waterloo RM (16.7% or 7,000). All other regions received minimal visitation levels.

The overnight excursions received by Toronto accounted for 1.0% of the region's total overnight pleasure visitors from the US, those received by Niagara accounted for 0.9% of its overnight US pleasure visitors and those received by Waterloo accounted for 28.0% of its overnight pleasure visitors from the US.

Since 84.2% of the Americans who visited Perth while on an overnight pleasure trip entered Ontario either via Sarnia or Windsor (Sarnia 69.1%, Windsor 15.1%), for these "excursionists", Perth is either a stop on the way to Toronto and Niagara, or Toronto, Niagara and Waterloo are excursions by the Perth visitors. Of th US overnight pleasure visitors who entered Ontario through Niagara, 15,000 visited Perth and of those who entered Ontario through Toronto, 6,000 visited Perth.

Conclusions:

- As far as the overnight US visitors to Perth are concerned, the region could be considered a travel region on its own right. However, an argument could be made for Perth to form a travel region wit Waterloo.

- Although there is an interaction between Perth, Toronto and Niagara, all three regions enhancing each other's appeal to these visitors, Perth does not play as significant a role for the Toronto and Niagara markets as they play for Perth.

Frontenac Of the total US overnight pleasure visits to Frontenac (0.110 million), 59,000, or 53.1% visited only the Frontenac region. This low incidence of "Frontenac-only" visitation seems to indicate that perhaps due to its location the region is more of a place to visit while on an overnight pleasure touring trip, or a stop on the way to another destination, rather than a destination on its own right.

The remaining 51,000 visitors to Frontenac (or 46.9%) visited 17 Ontario regions and generated in the process 109,000 overnight visits. These numbers imply that the overnight US pleasure visitors who visited Frontenac and one or more other Ontario regions, visited on average 3.14 Ontario regions (including Frontenac).

Niagara received 25.7% (or 28,000) of these "excursions", followed by Toronto (21.1% or 23,000), Ottawa-Carleton (14.7% or 16,000), Leeds & Grenville (12.8% or 14,000) and Cochrane (8.3% or 9,000). All other regions received minimal visitation levels.

The overnight excursions received by Niagara accounted for 2.4% of the region's total overnight pleasure visitors from the US, those received by Toronto accounted for 2.1% of its overnight US pleasure visitors, those received by Ottawa-Carleton accounted for 7.7% of its overnight US pleasure visitors, those received by Leeds & Grenville accounted for 7.8% of its total overnight pleasure visitors from the US and those received by Cochrane accounted for 50.0% of its overnight pleasure visitors from the US.

Conclusions:

- As far as the overnight US pleasure visitors to Frontenac are concerned, it appears that the region could form a travel region with Leeds & Grenville and Ottawa-Carleton.

- It could also form a virtual travel region with Toronto and Niagara, although the region is not as important to Toronto and Niagara as these two regions are for Frontenac.

- Frontenac appears to be well located on three important corridors: The Quebec border-Toronto-Niagara corridor, the Leeds & Grenville-Toronto-Niagara corridor and the Leeds & Grenville-Ottawa corridor.

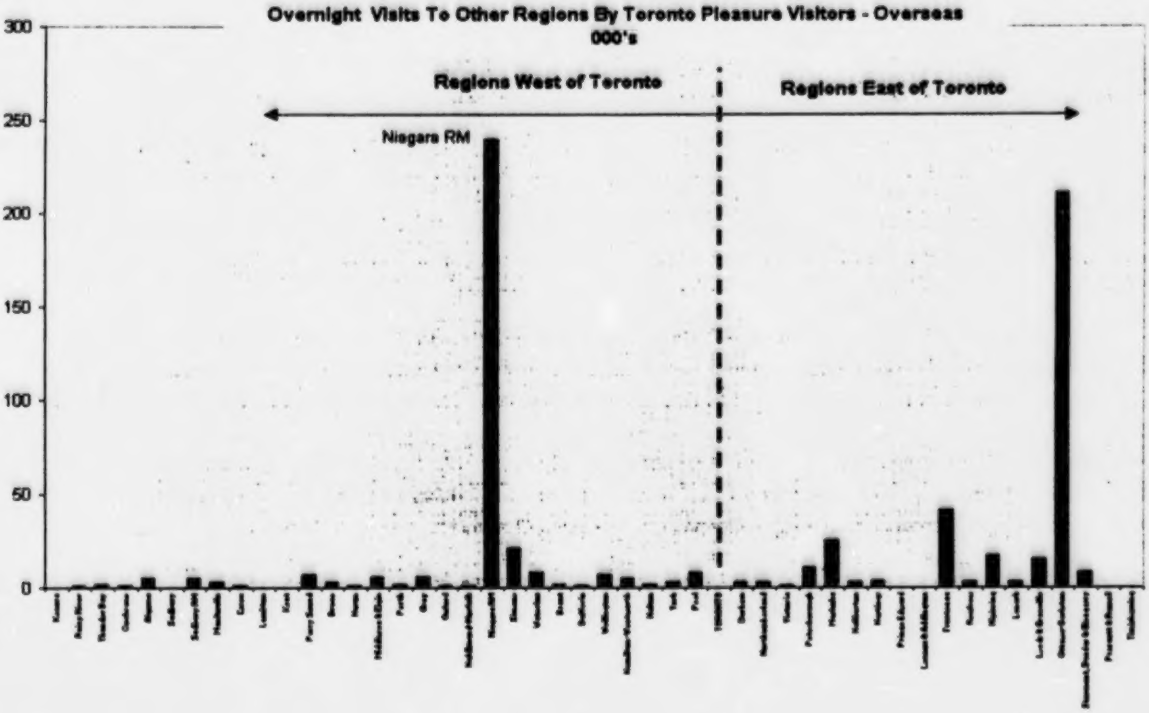
- As well, but of a lesser importance, Frontenac is well placed on the Leeds & Grenville-Northern Ontario corridor.

- Due perhaps to its location, Frontenac may play more of a role in the US touring market rather than the US market that takes trips to Ontario with a specific main destination in mind.

D.7. The Overseas Overnight Pleasure Market

Of the total overnight pleasure visitors to Ontario from overseas countries (1.114 million), 1.110 million, or 99.6%, had declared in 1996 the regions visited within Ontario. Three Ontario regions accounted for 81.2% of those with a known region visited. These regions were: Toronto, Niagara and Ottawa-Carleton.

Toronto Of the total overnight pleasure visits to Metro Toronto from overseas countries (0.755 million), 0.354 million, or 46.8% visited only Toronto. The remaining 401,000 visitors to Toronto (or 53.2%) visited 39 Ontario regions and generated in the process 690,000 overnight visits to other Ontario regions. These numbers imply that the overnight pleasure visitors from overseas who visited Toronto and one or more other Ontario regions, visited on average 2.72 Ontario regions (including Toronto).



Niagara RM received the largest share of these overnight excursions (34.8%, or 240,000), followed by Ottawa-Carleton (30.6%, or 211,000), Frontenac (5.9%, or 41,000), Muskoka (3.6%, or 25,000), Simcoe (2.9%, or 20,000), Nipissing (2.5%, or 17,000, of which 14,000 had an overnight visit in Algonquin Park), Leeds & Grenville (2.2% or 15,000) and Peterborough (1.6% or 11,000).

These overnight excursions from Toronto played a significant role in other regions' overseas pleasure market. They accounted for 53.2% of the Niagara region's overnight pleasure visitors from overseas, for 76.7% of Ottawa-Carleton's, for 73.2% of Frontenac's, for 69.0% of Simcoe's, for 89.3% of Muskoka's, for 70.8% of Nipissing's, for 53.6% of Leeds & Grenville's and for 84.6% of Peterborough's. In fact, for most of the Ontario regions a large share of their overnight pleasure visitors from overseas had also visited Metro

Toronto.

This is not surprising given the fact that 51.0% of the overnight pleasure visitors from overseas entered the province through Toronto.

Conclusions:

- As far as the overnight pleasure visitors from overseas are concerned, Toronto is an important feeder market for all Ontario regions.
- For these visitors, Toronto forms at least a one-way travel region with almost every county or district in Ontario and a two-way virtual travel region with Niagara and Ottawa.
- The majority of the overnight pleasure visitors to Toronto from overseas appear to be on touring trips to the region formed by Niagara-Simcoe-Muskoka-Algonquin Park-Ottawa-Leeds & Grenville-Frontenac-Toronto.

Niagara Of the total overnight pleasure visits from overseas to Niagara RM (0.451 million), 0.168 million, or 37.3% visited only Niagara. The remaining 283,000 visitors to Niagara (or 62.7%) visited 35 Ontario regions and generated in the process 533,000 overnight visits to other Ontario regions. These numbers imply that the overnight pleasure visitors from overseas who visited Niagara and one or more other Ontario regions, visited on average 2.88 Ontario regions (including Niagara).

Toronto received the largest share of these overnight excursions (45.0%, or 240,000), followed by Ottawa-Carleton (24.2%, or 129,000), Frontenac (6.2%, or 33,000), Leeds & Grenville (3.6% or 19,000), Simcoe (2.8%, or 15,000), Muskoka (2.3%, or 12,000) and Nipissing (1.9%, or 10,000, of which 9,000 had an overnight visit in Algonquin Park).

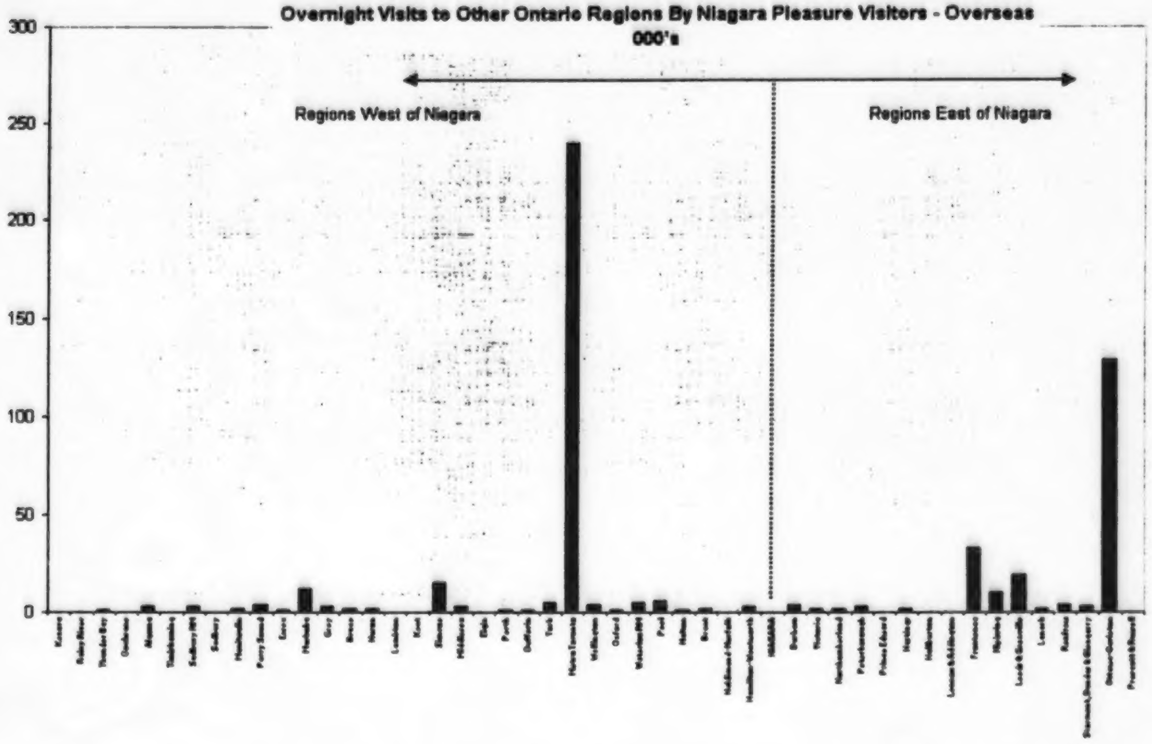
Since the list of regions that received these overnight "excursions" of the overseas pleasure visitors to Niagara is more or less the same as that of Toronto's, it seems that these visits were taken by the same visitors who had also visited Toronto.

These overnight "excursions" accounted for 31.8% of Toronto's overnight pleasure visitors from overseas countries, for 46.9% of Ottawa-Carleton's, for 58.9% of Frontenac's, for 67.9% of Leeds & Grenville's, for 51.7% of Simcoe's, for 42.9% of Muskoka's and for 41.7% of Nipissing's.

Conclusions:

- Although Niagara is not as important a destination as Toronto is for the overnight overseas pleasure visitors to Ontario, it does enhance Toronto's and Ontario's appeal to these visitors.
- It would appear that the region formed by Muskoka-Algonquin Park-Ottawa-Leeds & Grenville-Frontenac-Toronto-Niagara-Simcoe, forms a travel region for the overnight overseas visitors who appear to be in Ontario on a touring trip.
- An insignificant number of overnight pleasure visitors from overseas countries who entered Ontario through Niagara Falls ventures into Ontario's southwestern regions.

Ottawa-Carleton Of the total overnight pleasure visits from overseas countries to Ottawa-Carleton (0.275 million), 29,000, or 10.5% visited only Ottawa-Carleton. The remaining 246,000 visitors to Ottawa (or 89.5%) visited 33 Ontario regions and generated in the process 492,000 overnight visits to other Ontario regions. These numbers imply that the overnight pleasure visitors from overseas who visited Ottawa-Carleton and one or more other Ontario regions, visited on average 3.00 Ontario regions (including Ottawa).



Toronto received the largest share of these overnight excursions (42.9%, or 211,000), followed by Niagara (26.2%, or 129,000), Frontenac (7.9%, or 39,000), Leeds & Grenville (3.3% or 16,000), Nipissing (2.8%, or 14,000, of which 12,000 had an overnight visit in Algonquin Park), Muskoka (2.4%, or 12,000) and Simcoe (2.0%, or 10,000).

As was the case with Niagara, the list of regions visited by overseas visitors who visited Ottawa-Carleton not only matches that of Toronto in names, but also in ranking and levels of visitation, indicating again that these visits were taken by the same overseas visitors who had also visited Toronto and Niagara and these other regions.

These overnight "excursions" accounted for 27.9% of Toronto's overnight pleasure visitors from overseas countries, for 28.6% of Niagara's, for 69.6% of Frontenac's, for 57.1% of Leeds & Grenville's, for 58.3% of Nipissing's, for 42.9% of Muskoka's and for 34.5% of Simcoe's.

Conclusions:

- Although Ottawa-Carleton is not as important a destination as Toronto and Niagara are for the overnight pleasure visitors from overseas countries, it does enhance Toronto's and Ontario's appeal to these visitors.

- It would appear that the region formed by Muskoka-Algonquin Park-Ottawa-Leeds & Grenville-Frontenac-Toronto-Niagara-Simcoe, forms a travel region for the overnight pleasure visitors from overseas who appear to be on a touring trip.

APPENDIX

TABLE 1: Overnight Visits In Ontario, 1996
(000's)

	Origin Of Visitors								
Area Visited	USA	Over-seas	Ontario	Quebec	Mani-toba	Atlantic Canada	Western Canada	Total	Shares
Total Overnight Visits in Ontario	6,788	2,188	27,024	1,538	407	355	644	38,944	-
Total Overnight Visits in Ontario With known City/County Visited	6,784	2,180	26,880	1,465	407	349	633	38,698	100.0%
Metropolitan Toronto	2,181	1,397	3,232	526	79	174	366	7,955	20.6%
Niagara RM	1,452	616	1,076	53	4	18	21	3,240	8.4%
St. Catharines-Niagara CMA	1,298	598	1,064	53	4	17	21	3,055	7.9%
Ottawa-Carlton RM	377	473	1,487	482	37	93	117	3,066	8.1%
Simcoe C	65	54	2,343	11	2	13	22	2,510	6.5%
Collingwood	7	0	460	0	0	0	1	468	1.2%
Barrie	10	20	425	10	0	6	0	471	1.2%
Orillia	20	10	428	0	2	1	4	465	1.2%
Midland	14	16	466	0	0	1	10	507	1.3%
Muskoka DM	29	45	1,389	1	1	2	1	1,468	3.8%
Elgin & Middlesex C	183	43	1,105	20	4	9	26	1,390	3.6%
London CMA	178	40	1,013	19	4	9	26	1,289	3.3%
Frontenac C	162	93	798	76	3	10	7	1,149	3.0%
Kingston	114	90	637	76	3	10	7	937	2.4%
Essex C	454	28	649	15	1	5	7	1,159	3.0%
Windsor CMA	295	27	495	15	1	5	7	845	2.2%
Peterborough C	89	27	921	6	0	2	3	1,048	2.7%
Peterborough	81	23	666	6	0	2	3	781	2.0%
Bruce County	71	13	816	0	0	0	5	905	2.3%
Hastings C	70	13	782	18	3	4	6	896	2.3%
Belleville	33	10	414	18	3	4	3	485	1.3%
Waterloo RM	75	42	678	14	4	4	3	820	2.1%
Kitchener CMA	70	41	666	14	3	4	13	811	2.1%
Parry Sound D	34	20	760	0	0	0	0	814	2.1%
Algoma D	286	33	445	15	7	4	9	799	2.1%
Sault Ste. Marie	157	28	246	2	7	2	6	446	1.2%
Elliot Lake	3	2	53	0	0	2	0	60	0.2%

TABLE 1: Overnight Visits In Ontario, 1996 (000's)

	Origin Of Visitors								
Area Visited	USA	Over-seas	Ontario	Quebec	Mani-toba	Atlantic Canada	Western Canada	Total	Shares
Renfrew C	40	12	638	38	2	1	4	735	1.9%
Pembroke	8	3	141	6	0	1	3	162	0.4%
Nipissing D	62	38	599	21	2	3	5	730	1.9%
Algonguin Park	10	27	81	2	0	0	0	120	0.3%
North Bay	38	11	375	17	1	3	5	450	1.2%
Lambton C	129	14	552	0	2	3	23	723	1.9%
Sarnia-Clearwater	69	10	232	0	2	3	23	339	0.9%
Durham RM	61	31	585	6	2	12	11	708	1.8%
Oshawa	48	18	274	6	2	9	10	367	0.9%
Peel RM	149	84	433	5	0	13	8	692	1.8%
Thunder Bay D	231	38	402	6	47	1	12	737	1.9%
Thunder Bay CMA	179	31	258	6	41	1	8	524	1.4%
Hamilton-Wentworth RM	123	46	491	8	2	8	12	690	1.8%
Leeds & Grenville U.C.	233	45	404	28	0	3	2	715	1.8%
Brockville	33	11	134	5	0	3	0	186	0.5%
Haliburton C	16	8	615	0	0	3	5	647	1.7%
York RM	78	41	445	0	1	7	12	584	1.5%
Sudbury RM	29	21	483	7	8	2	4	554	1.4%
Kenora D	208	2	93	0	216	1	12	532	1.4%
Kenora	75	2	31	0	105	0	3	216	0.6%
Halton RM	65	36	389	6	5	6	21	528	1.4%
Wellington C	40	25	399	8	1	3	5	481	1.2%
Guelph	33	19	242	8	0	2	2	306	0.8%
Victoria C	31	5	434	3	0	0	0	473	1.2%
Lindsay	0	1	103	0	0	0	0	104	0.3%
Grey C	56	17	394	0	1	0	2	470	1.2%
Owen Sound	3	5	228	0	0	0	2	238	0.6%
Stormont, Dundas & Glengarry U.C.	83	18	258	54	1	11	3	428	1.1%
Cornwall	73	11	142	34	1	11	3	275	0.7%
Perth C	174	8	235	1	0	2	4	424	1.1%
Stratford	157	5	133	1	0	0	4	300	0.8%

TABLE 1: Overnight Visits In Ontario, 1996
(000's)

	Origin Of Visitors								
Area Visited	USA	Over-seas	Ontario	Quebec	Mani-toba	Atlantic Canada	Western Canada	Total	Shares
Northumberland C	39	9	361	9	0	1	1	420	1.1%
Cobourg	7	4	107	0	0	1	0	119	0.3%
Kent C	71	3	328	0	0	0	2	404	1.0%
Lanark C	37	5	295	5	0	3	7	352	0.9%
Cochrane D	26	4	295	13	0	2	1	341	0.9%
Timmins	6	3	189	6	0	1	0	205	0.5%
Haldimand-Norfolk RM	17	5	317	0	0	0	0	339	0.9%
Huron C	29	5	298	0	0	0	0	332	0.9%
Brant C	34	17	218	0	0	2	2	273	0.7%
Brantford	34	16	156	0	0	2	2	210	0.5%
Oxford C	37	8	191	0	1	1	8	246	0.6%
Timiskaming D	21	1	199	9	2	0	2	234	0.6%
Kirkland Lake	3	1	34	0	1	0	0	39	0.1%
Haileybury	9	0	108	4	0	0	2	123	0.3%
Sudbury D	26	0	189	0	0	0	2	217	0.6%
Manitoulin D	15	7	178	0	0	0	5	205	0.5%
Lennox & Addington C	21	2	158	0	0	1	0	182	0.5%
Prescott & Russell U.C.	43	3	97	33	0	1	0	177	0.5%
Prince Edward C	16	2	139	9	0	1	0	167	0.4%
Rainy River D	111	2	58	0	19	0	2	192	0.5%
Dufferin C	19	4	68	2	0	0	2	95	0.2%

TABLE 2: Overnight Pleasure Visits In Ontario, 1996 (000's)

	Origin Of Visitors								
Area Visited	USA	Over-seas	Ontario	Quebec	Mani-toba	Atlantic Canada	Western Canada	Total	Shares
Overnight Pleasure Visits in Ontario	3,893	1,114	11,569	417	196	80	114	17,383	-
Overnight Pleasure Visits in Ontario With known City/County Visited	3,890	1,110	11,494	404	196	78	108	17,280	100.0%
Metropolitan Toronto	1,076	755	807	108	26	52	61	2,885	16.7%
Niagara RM	1,149	451	559	30	3	9	9	2,210	12.8%
St. Catharines-Niagara CMA	1,044	437	559	30	3	9	9	2,091	12.1%
Simcoe C	33	29	1368	6	0	5	3	1,444	8.4%
Collingwood	7	0	308	0	0	0	1	316	1.8%
Barrie	6	11	142	6	0	3	0	168	1.0%
Orillia	14	6	273	0	0	0	0	293	1.7%
Midland	4	10	334	0	0	1	2	351	2.0%
Muskoka DM	15	28	1,059	1	0	0	0	1,103	6.4%
Ottawa-Carlton RM	208	275	368	124	8	12	27	1,022	5.9%
Peterborough C	49	13	593	3	0	0	1	659	3.8%
Peterborough	44	11	386	3	0	0	1	445	2.6%
Bruce C	49	5	563	0	0	0	2	619	3.6%
Frontenac C	110	56	417	19	1	3	2	608	3.5%
Kingston	74	55	300	19	1	3	2	454	2.6%
Haliburton C	10	5	496	0	0	2	0	513	3.0%
Parry Sound D	23	10	460	0	0	0	0	493	2.9%
Algoma D	252	22	217	2	4	0	3	500	2.9%
Elliot Lake	2	0	23	0	0	0	0	25	0.1%
Sault Ste. Marie	131	17	90	2	4	0	1	245	1.4%
Hastings C	46	7	353	3	2	1	0	412	2.4%
Belleville	20	5	102	3	2	1	0	133	0.8%
Renfrew C	26	6	345	24	0	0	0	401	2.3%
Pembroke	2	2	57	1	0	0	0	62	0.4%
Leeds & Grenville UC	179	28	212	10	0	0	0	429	2.5%
Brockville	20	5	40	0	0	0	0	65	0.4%
Thunder Bay D	165	27	176	3	17	0	6	394	2.3%
Thunder Bay CMA	125	19	75	3	14	0	4	240	1.4%

TABLE 2: Overnight Pleasure Visits In Ontario, 1996 (000's)

	Origin Of Visitors								
Area Visited	USA	Overseas	Ontario	Quebec	Manitoba	Atlantic Canada	Western Canada	Total	Shares
Nipissing D	42	24	281	4	0	0	3	354	2.0%
Algonguin Park	7	19	81	2	0	0	0	109	0.6%
North Bay	26	4	121	2	0	0	3	156	0.9%
Kenora D	157	1	40	0	152	0	0	350	2.0%
Kenora	58	1	17	0	72	0	0	148	0.9%
Essex C	208	5	155	11	0	0	4	383	2.2%
Windsor CMA	88	4	112	11	0	0	4	219	1.3%
Lambton C	70	3	261	0	0	0	0	334	1.9%
Sarnia-Clearwater	26	1	59	0	0	0	0	86	0.5%
Elgin & Middlesex C	63	10	174	9	0	2	1	259	1.5%
London CMA	61	10	143	9	0	2	1	226	1.3%
Victoria C	27	3	217	0	0	0	0	247	1.4%
Lindsay	0	0	18	0	0	0	0	18	0.1%
York RM	7	11	214	0	0	4	1	237	1.4%
Perth C	152	5	71	0	0	0	0	228	1.3%
Stratford	144	3	45	0	0	0	1	193	1.1%
Haldimand-Norfolk RM	7	1	215	0	0	0	0	223	1.3%
Grey C	35	9	168	0	0	0	2	214	1.2%
Owen Sound	1	4	88	0	0	0	2	95	0.6%
Waterloo RM	25	12	167	5	0	0	5	214	1.2%
Kitchener CMA	22	12	166	5	0	0	5	210	1.2%
Durham RM	15	8	184	2	0	1	0	210	1.2%
Oshawa	11	5	39	2	0	1	0	58	0.3%
Hamilton-Wentworth RM	39	12	140	2	1	2	2	198	1.1%
Kent C	39	1	136	0	0	0	0	176	1.0%
Huron C	18	3	143	0	0	0	0	164	0.9%
Sudbury RM	14	10	127	4	4	1	0	160	0.9%
Stormont, Dundas & Glengarry UC	19	12	104	22	0	1	1	159	0.9%
Cornwall	15	7	37	12	0	1	1	73	0.4%
Lanark C	25	3	126	2	0	0	0	156	0.9%

TABLE 2: Overnight Pleasure Visits in Ontario, 1996 (000's)

	Origin Of Visitors								
Area Visited	USA	Over-seas	Ontario	Quebec	Mani-toba	Atlantic Canada	Western Canada	Total	Shares
Northumberland C	25	3	119	0	0	1	0	148	0.9%
Cobourg	2	2	18	0	0	1	0	23	0.1%
Cochrane D	18	3	123	2	0	0	0	146	0.8%
Timmins	1	2	92	2	0	0	0	97	0.6%
Manitoulin D	13	5	120	0	0	0	2	140	0.8%
Sudbury D	20	0	99	0	0	0	2	121	0.7%
Wellington C	9	11	100	0	0	0	4	124	0.7%
Guelph	6	8	53	0	0	0	1	68	0.4%
Prince Edward C	3	0	85	9	0	0	0	97	0.6%
Peel RM	30	24	36	0	0	4	0	94	0.5%
Timiskaming D	16	0	65	3	0	0	0	84	0.5%
Haileybury	6	0	36	0	0	0	0	42	0.2%
Kirkland Lake	2	0	9	0	0	0	0	11	0.1%
Lennox & Addington C	1	0	81	0	0	0	0	82	0.5%
Halton RM	12	8	48	0	0	1	1	70	0.4%
Rainy River D	88	1	12	0	1	0	2	104	0.6%
Oxford C	9	2	38	0	0	0	0	49	0.3%
Brant C	4	13	19	0	0	0	0	36	0.2%
Brantford	4	13	17	0	0	0	0	34	0.2%
Prescott & Russell UC	6	1	21	6	0	0	0	34	0.2%
Dufferin C	1	1	7	0	0	0	0	9	0.1%